

Third Annual
Business Analyst Professional Development Day
Wednesday, April 25, 2012



Making the Connection

The BABOK[®]:

from Theory to Practical Application

\$99 for IIBA Members
\$129 for Non-Members



Space is Limited to 400 attendees
Register TODAY to guarantee your seat!

Location hosted by:

**COLLEGE OF
CONTINUING EDUCATION**

UNIVERSITY OF MINNESOTA

Register today to join business analysts from around the region at this development event. You'll explore skills and techniques that will drive both personal and project success. IIBA MSP is proud to offer hands-on workshops from engaging industry experts who will show you how to take the theories of the BABOK[®] into real-life application.

Event Schedule

| Time | Track 1 Room 135A | Track 2 Room 135B | Track 3 Room 83 | Track 4 Room 42 |
|--------------------|---|--|---|--|
| 7:30 – 8:25 a.m. | Registration & Networking | | | |
| 8:25 – 9:30 a.m. | Opening Remarks & Keynote Presentation Embrace & Influence Change Mary Kaufmann | | | |
| 9:30 – 9:45 a.m. | Room Change & Networking Break | | | |
| 9:45 – 10:45 a.m. | The Influencing Formula: Three Steps To Influencing When You Don't Have the Authority Elizabeth Larson, PMP, CBAP®, CSM | Functional Requirements - Hardly the Tip of the Iceberg Kate McGoey | You Decided to do What? Decision Making and its Impacts Paula Bell | Take Your BA Show on the Road Curtis Michelson |
| 10:45 – 11:00 a.m. | Room Change & Networking Break | | | |
| 11:00 – 12:50 a.m. | Lunch & Keynote Presentation Topic to be Announced Kit Welchlin | | | |
| 12:50 – 1:00 p.m. | Room Change | | | |
| 1:00 – 2:00 p.m. | The Top 10 Mistakes Business Analysts Make in Capturing Business Rules Gladys Lam | Virtual Requirements Facilitation Doug Jackson, CBAP® | Estimating in the Wild Without Silver Bullets Kent McDonald | Dump the Past and SHINE Forward Dayle Beyer, CBAP® |
| 2:00 – 2:15 p.m. | Room Change & Networking Break | | | |
| 2:15 – 3:15 p.m. | Eliciting Stakeholder Stories Christine Moore | Strategic Thinking for Today's Business Analyst Susan K. Heidorn, Ed.D. | Managing Business Analysts Barbara Carkenord, CBAP® | Scope Clairvoyance: Determining What's Needed. Deciding What's Important. Christian Milaster, PMP |
| 3:15 – 3:30 p.m. | Room Change & Networking Break | | | |
| 3:30 – 4:30 p.m. | Keynote Presentation & Closing Remarks Fantastic Voyage or the Impossible Dream? The BA as Management Consultant Rich Larson, CBAP® | | | |

* Scheduled speakers and presentations may change.

Speaker Presentations

Embrace & Influence Change

Keynote Presented by Mary Kaufmann

Rapid change is a consistent reality in our work and in life. Success in today's marketplace goes to those who can quickly recognize and react to opportunities and challenges. Professionals are frequently looked to as the agents to influence change quickly and effectively. This interactive session will offer powerful and practical methods for participants to embrace and influence positive change in their work and in life.

Change happens when people start acting differently. Especially in the workplace –change is difficult unless it connects to the minds and hearts of people. In this session, our speaker will leverage her rich background in leading and influencing positive change while bringing the latest 21st century thinking (using relevant and easy to obtain materials) to bear on the topic.

You will learn:

- Embrace and influence the natural laws of change for ourselves and others.
- Engage in practical methods to become 'change-ready' for the future and use a common language when referring to change.
- Learn how to promote a shared ownership of the change process in your organization and learn strategies to shape and leverage the changes that support the overall mission of the organization.



Mary Kaufmann, *Muskingum University*

Mary Kaufmann serves as Assistant Professor of Informatics and Program Manager for MISST, Master of Information Strategy, Systems and Technology, an online MBA/MIS integrated program at Muskingum University.

Mary brings more than two decades of experience leading teams, implementing new technology, leading management training and development, strategic design and implementation. She spent nine years with Ameritech (now AT&T), served in strategic positions at the Longaberger Company and as a Business management consultant. She is a 1987 graduate of Muskingum University with a double major in Computer Science and Business. She completed an MBA from Baldwin Wallace College in 1990 and graduated in 2008 with a Master of Divinity from Ashland Theological Seminary. She also contributed to a book written in Association with the Sandberg Leadership Center called Leadership Character, which was published in 2002.

The Influencing Formula: Three Steps to Influencing When You Don't Have the Authority

Presented by Elizabeth Larson, PMP, CBAP®, CSM

In order to help organizations manage the rapid changes inevitable in today's business environment, business analysts have to influence other stakeholders, regardless of their position in the organization. What makes this ability to influence without authority seem so easy for some and nearly impossible for others? Some follow the three steps which comprise the Influence Formula. In this presentation you will be shown how the Influence Formula works and the three steps required to effectively influence without authority.

This presentation describes:

- The distinction between influence, persuasion, and manipulation
- The relationship between authority and power
- Tips for building and maintaining trust
- How to be the trusted advisor to business owners and sponsors to help them manage change
- Tips to analyze the business need and ensure that your recommended solutions solve real business problems
- The role of courage in effective influencing

You will learn:

- Describe ways to build and break trust
- Describe the relationship between preparation and influence
- Discuss why we need courage to influence effectively



Elizabeth Larson, Principal, PMP, CBAP®, CSM – *Watermark Learning*

Elizabeth Larson is Co-Principal and CEO of Watermark Learning and has over 25 years of experience in project management and business analysis. Elizabeth's speaking history includes repeat presentations at IIBA and PMI chapter meetings, Professional Development Days and international conferences.

Elizabeth has co-authored the *CBAP Certification Study Guide* and *Practitioners' Guide to Requirements Management*. She has also co-authored numerous articles on project management and business analysis published worldwide. She has also been cited in CIO and PM Network, PMI's monthly publication.

Elizabeth was a lead contributor to the *BABOK® Guide* Version 2.0 Chapter 2, Business Analysis Planning and Monitoring, *PMBOK® Guide – Fourth Edition* (Collect Requirements), to the IIBA/PMI jointly-sponsored white paper on the collaboration between the PM and BA, and is the content lead for Scope Management for the *PMBOK® Guide – Fifth Edition*. Elizabeth writes a monthly blog for and is co-author of articles that appear regularly in Project Times and BATimes.

Functional Requirements – hardly the tip of the Iceberg!

Presented by Kate McGoey

Project teams often get captivated by functional requirements, so much so that BAs typically spend the bulk of their time working with stakeholders to gather and define the system's key functionality. Occasionally, non-functional requirements get remembered and the BA will then capture them as well, but what about all the *rest* of the requirements? The ones on nobody's radar -- those hiding well beneath the surface, out of the project's direct line of sight? These indirect but otherwise important requirements will *sink* your project if you cruise through defining only functional requirements. As a BA, you must consider and scope those "hidden" requirements early ... otherwise, you'll find your project (or your product) under water very quickly.

Kate will share some tips for identifying critical, but often overlooked requirements. She will share techniques for uncovering critical transition requirements and will highlight the importance of looking across interfaces to identify cross-functional or back-office system impacts. Defining these broader-scope needs more deliberately – and ensuring there are owners to address them – will guide you and your team to a much more successful outcome.

You will learn:

- Learn about requirements beyond Functional and Non-Functional requirements
- Discuss critical factors for successful project delivery
- Learn tips and techniques for scoping, structuring requirements and managing them holistically so nothing important gets missed



Kate McGoey- B2T Training

Kate McGoey, Director, Client Solutions, B2T Training, has more than 20 years' experience in different application development and lifecycle process positions, but finds business analysis is her passion and professional center of gravity. Winner of the inaugural Requirements Lifecycle Award from requirements.net, Kate has both internal back-office and commercial software product development experience. She has performed principal BA or PM roles on technology projects and improvement initiatives serving the management consulting, publishing, life sciences and business services industries.

Kate has been a panelist and featured speaker at BA industry conferences, and a presenter at local IIBA chapter meetings. Discussion topics at these sessions have included professional development, mentoring and career paths for BAs; creating and managing BA Centers of Excellence; effective use of requirements tools on projects; and critical foundations for requirements success.

You Decided to Do What? Decision-Making and its Impacts

Presented by Paula Bell

A careful look at how impact analysis and decision-making tools can be used for good and not evil. Lively discussion includes the impacts of decision-making within the context of the project lifecycle, as well as more broadly across an organization. Also includes new ways of considering decisions, and tips for following through.

You will learn:

- Think about effective decision-making in a new way
- Gain decision-making tools
- Practice good decision-making habits



Paula Bell – Your Clear Next Step

Paula Bell is a Business Analyst, mentor and coach known for consistently producing exceptional work, providing guidance to aspiring business analysts (including those that just want to sharpen their skills), as well as, providing creative and strategic ways to build relationships for successful projects. With 14 years in project roles to include business analyst, requirements manager, technical writer, project manager, developer, test lead and implementation lead), Paula has experience in a variety of industries to include media, courts, carpet manufacturing, banking and mortgage. Paula has had the opportunity to speak on a variety of topics to include business analysis, project management, relationship building, diversity and software methodology to name a few. Paula's passion and dedication to help others succeed in their career goals and aspirations has provided exceptional value to

those she has mentored, coached and trained. Paula holds a Bachelor of Science in Management Information Systems (MIS) from Oral Roberts, University and is Business Analyst Certified through B2T Training. Paula has also written articles for the B2T Training Magazine, "The Bridge" on the Importance of Requirements Management Planning, Modern Analyst.com and BA Times.com. Paula is looking to pursue her CBAP certification in the near future.

Take Your BA Show On The Road

Presented by Curtis Michelson

Similar to the old question, "What are you going to do with that <<fill in the name of any liberal arts degree>> major?", one can also ask, "Where can you go next with all that BA experience?"

Sure, you can move up the chain in an enterprise, become a Senior Super BA, maybe even Peter Principle into upper management. But what do you really want to do, that could tap your pent-up creative liberal arts potential, and make your heart sing? What if you could carve a new career path for yourself, that would not only bring your BA analytic firepower to bear, but also your well-earned business acumen, marketing acuity, strategic insight, domain or vertical market knowledge, all of those together into a practice that is unique to you and all your own? Would you do it?

Well, some of us are doing just that as BA consultants. In this workshop, I will pick up from where Bob Prentiss left off in his "Getting Out Of Career Deep Freeze," by providing real life stories, "from the field" as it were, of several successful solo BA practitioners. We'll discuss helpful tips, like how to "sell" your BA value to an audience who might not even understand what BA is, and we'll hear about some common pitfalls to avoid, when taking your show on the road as a BA in the big wide world.

You will learn:

- Know thyself - use various tools assess where you are and if you're ready to fly solo
- Make a Plan - develop a clear plan and approach for your particular situation
- Sell, sell, sell - marketing and business strategies for success



Curtis Michelson - Specs & Reqs

I've been an IT professional for 15 years, and currently practice business analysis as a solo entrepreneur with my focus on the publishing industry. My BA work is informed by a lifelong curiosity in the S.O.E. (school of everything). Over my career, I've spoken on a range of topics from community nonprofit issues to business pitches and presentations. My workshops are considered 'unique' experiences, fun and memorable. I spoke at the Orlando IIBA chapter last year and did a report on the Building Business Capability event. My slide deck opened with the question: "Where is your BA road heading - to Heaven or Hell?" What ensued was a fun walkthrough of BBC that lifted up the major themes of the event and painted a picture of future megatrends and maturity directions for our profession.

Keynote Presentation

Presented by Kit Welchlin

Kit is crafting a presentation specifically tailored for the Twin Cities Business Analysis community. Further details will be posted on the Chapter web site.



Kit Welchlin- Welchlin Communication Strategies

Kit began public speaking at the age of 9 in 4-H. By 16, he was organizing and facilitating presentations on leadership, citizenship, community service and motivation for the 4-H and Future Farmers of America. Kit has a B.S. Degree in Speech Communication, Business Administration and Political Science. He earned an M.A. Degree in Speech Communication and Business Administration. Kit purchased his first manufacturing company at age 21, and by 26 was CEO and Chairman of the Board of three manufacturing companies in three states. He's been an instructor with the Minnesota State Colleges and Universities, where he has been repeatedly nominated Outstanding Faculty. He is a Professional Member of the National Speakers Association

When Kit Welchlin steps up in front of a group, it's as a teacher, an entertainer and down-to-earth guy. This approach has helped him earn the respect and appreciation of audiences for years across a wide variety of organizations. Often described as "high energy" and "entertaining," he weaves his special blend of entertainment with practical strategies that enhance listeners' personal and professional lives. Because Kit's goal is for each presentation to feel like a personal experience for the audience, he often customizes his content, sharing proven methods and techniques that are truly relevant. Kit's gift is his ability to transform his audience to active participants who feel like they've engaged in a conversation. At the end of the speech, workshop or presentation, audiences walk away energized and informed, armed with new tools and strategies, and believe their time with Kit was very well spent

The Top 10 Mistakes Business Analysts Make in Capturing Business Rules

Presented by Gladys Lam

Albert Einstein famously said, “Anyone who has never made a mistake has never tried anything new.” Mistakes happen. What’s important is what we learn from them, and armed with those insights, how we improve our practices going forward.

This presentation distills 14 years of direct, hands-on experience with business rule projects. It also summarizes the most important points raised at the Business Rules Forum during my 10 years of moderating the annual Practitioner’s Panel.

If you’re looking for a complete run-down of the dos and don’ts of business rules and decision analysis, this presentation is for you. Find out from those who have already been there how you can avoid common pitfalls.

You will learn:

- Understand recurring mistakes in undertaking business rules projects and why people make them.
- Learn how to maximize your chances of success – the most important things you should know.
- Identify a pragmatic check list of best practices and critical success factors.



Gladys Lam – *Business Rule Solutions, LLC*

Gladys S.W. Lam is a world-renowned authority on applied business rule techniques. She is Principal and Co-founder of Business Rule Solutions, LLC (BRSolutions.com), the most recognized company world-wide for business rules and decision analysis. BRS provides methodology, publications, consulting services, and training. Ms. Lam is co-creator of **Proteus**[®], the BRS methodology. She is co-founder of **BRCCommunity.com**, a vertical community for professionals and home of Business Rules Journal. She co-authored **Building Business Solutions**, an IIBA sponsored handbook on business analysis with business rules.

Ms. Lam is widely known for her lively, pragmatic style. She speaks internationally at conferences and other professional events. She co-presents public seminars through AttainingEdge. She is also Executive Director of Building Business Capability (BBC) Conference, which includes the Business Rules Forum and the Business Analysis Forum, the official conference of the IIBA[®].

Virtual Requirements Facilitation

Presented by Doug Jackson, CBAP[®]

What does it take to engage the front lines of the business in a dialogue about change? Building momentum while collaborating at a distance calls for a purposeful process to convene resources across the enterprise and additional techniques must be employed to offset the difficulties of remote communication. Facilitation has traditionally been a formidable challenge for business analysts. Getting stakeholders to attend, contribute constructively, and stay on topic is an art in itself. But these difficulties are compounded when the facilitation is conducted from a distance. It’s harder for attendees to follow a meeting process; lack of visual cues and feedback mechanisms can lead participants to become observers rather than contributors; traditional trust-building interventions become awkward and without informal interactions the tone of conversation remains reserved and less inviting to open collaboration.

This talk focuses on a real world example of an organization that skillfully addressed these issues. Learn new ways to create interest for your facilitation sessions using techniques such as a view from the future, visualization, mind mapping, a day in the life, and buy a feature to make your sessions more fun and productive. Also learn about promising technologies which leverage social networks and world time zones. The session will be interactive and attendees will leave with a guide to some of the new techniques and how they can be applied to common business analysis facilitation challenges.

You will learn:

- New ways to keep attendees (in person and virtual) engaged in an age of multitasking
- How to effectively elicit requirements in a virtual environment
- Application of social networks in a way to capture and verify requirements
- New techniques that can make gathering requirements fun for attendees and increase the likelihood of future meeting attendance



Doug Jackson, CBAP[®] - *Doreen Evans Associates, Inc.*

Doug Jackson is a Certified Business Analysis Professional with more than 20 years experience in all areas of business analysis. Doug has extensive experience working with organizations of all types to improve Business Analysis Competency as well as enterprise-level business analysis maturity. Doug currently serves as Vice President for Doreen Evans Associates, helping organizations to apply the business analysis discipline to improve project outcomes and manage organizational change. Doug also serves on the leadership board for the Industry Advisory Council, an collaborative group of industry and federal government architects working on to improve the delivery of government services to its citizens.

Estimating in the Wild without Silver Bullets

Presented by Kent McDonald

What do poker, Greek oracles, an Italian mathematician from the middle ages, and the path of hurricanes have in common? Given the title of this presentation, chances are it has something to do with estimation, but you'll have to come see it to get the full connection.

In case that wasn't sufficient enticement, Kent McDonald discusses the challenges and realities of estimating knowledge work, be it analysis, testing, software development, or the entire effort. One big challenge and reality is there are no guaranteed ways to arrive at perfectly accurate or precise estimates, which ironically is why they are called estimates. Not being one to whine about a problem without offering a solution, Kent introduces and gives you a chance to practice some practical techniques that your team can use to quickly determine estimates that are just as informative as the ones you just spent six weeks formulating.

You will learn:

- Understand common issues with estimating
- Learn four techniques for estimating business analysis activities
- Learn how the four techniques address the common estimating issues



Kent J. McDonald – Knowledge Bridge Partners

Kent J. McDonald is an author, speaker, and coach who helps organizations understand their problems and implement solutions. His more than 15 years of experience include work in business analysis, strategic planning, project management, and product development in a variety of industries including financial services, health insurance, performance marketing, human services, nonprofit, and automotive. He is co-author of *Stand Back and Deliver: Accelerating Business Agility* and currently delivers business analysis training for B2T Training, and shares his thoughts on raising the level of business analysis at Beyondreqs.com

Kent has a Bachelor of Science in Industrial Engineering from Iowa State University and an MBA from Kent State University.

Dump the Past and SHINE Forward

Presented by Dayle Beyer, CBAP®, PMP, IT-SVM, ACC, PMI-RMP®

Providing feedback has long been considered to be an essential development skill for leaders, teams and organizations. As they strive to achieve the goals people want and need to know how they are doing. They need to know if their performance is in line with expectations. They need to learn what they have done well and what they need to change. Traditionally, this information has been communicated in the form of “downward feedback” from leaders to their team members and “upward feedback” with the advent of 360 degree multi-rater assessments.

But there is a fundamental problem with all types of feedback: it focuses on the past, on what has already occurred—not on the infinite variety of opportunities that can happen in the future. As such, feedback can be limited and static as a developmental tool, as opposed to expansive and dynamic.

SHINE Forward helps people envision and focus on a positive present and future, not a failed or less than stellar past. We use a proven model of innovation and success that includes “FeedForward” and “The Bigger Game” which challenges us to become our most positive best and calls us to SHINE Forward into new frontiers of growth and success never thought possible. SHINE Forward defines where you are today and provides clarity and tools for what to do next. Are you ready to SHINE Forward and play YOUR Bigger Game?

You will learn:

- How to clearly define the 9 elements of The Bigger Game Model



Dayle Beyer, CBAP®, PMP, IT-SVM, ACC, PMI-RMP® – Inspire Excellence Coaching

As President of Inspire Excellence Coaching & Training, I seek to inspire excellence in thousands of people around the world by providing international best practice tools and techniques of project management, business analysis and coaching in order to drive successful organizational change initiatives, provide proven concepts for exam preparation success, and facilitate process, product and system improvements.

I am passionate about Project Management and Business Analysis because I believe I was born to be a catalyst and change agent.

My mind's eye quite naturally sees the forest AND the trees. I'm constantly seeking ways to provide more value to individuals, projects, programs and organizations. I am also passionate about being a Co-Active Coach and doing coaching because it accelerates individual and organizational growth by co-actively deepening the learning and forwarding the action. I presently serve as Community Coach Café coordinator through the Chicagoland Coach Federation.

Eliciting Stakeholder Stories

Presented by Christine Moore

In the old days we called it “Gathering Requirements” as if they were out there fully formed and just waiting to be harvested... Today, we understand that our role as Business Analysts is to elicit the stories behind requirements thus allowing our stakeholders the opportunity to bring their thoughts to life. This presentation will give attendees a robust approach to eliciting the context surrounding the requirements they seek and in doing so help stakeholders tell their story.

You will learn:

- The difference between gathering and eliciting requirements.
- Embrace elicitation as a communicative relationship with stakeholders
- Understand how eliciting stakeholder stories contributes to project and product quality.



Christine Moore- *Arthur Maxwell, Inc.*

Christine Moore is a Consultant, Facilitator, and Instructor specializing in Project, Program, and Change Management. For more than 15 years, Christine has led, trained, and coached teams charged with making change. Specializing in creating engaging learning experiences for leaders to broaden their perspective and develop their skills, Christine uses story and simulation to bring subject matters to life.

Christine routinely presents to large and small groups within her clients’ organizations and has delivered hundreds of workshops in all regions of the world.

Christine is a certified Project Management Professional (PMP®), is certified as a professional facilitator by the International Association of Facilitators, is a certified Myers-Briggs® consultant, holds a Bachelors degree in Management Information Systems, and is working toward a Masters degree in Human Resource Development.

Managing Business Analysts

Presented by Barbara A. Carkenord, CBAP®

Business Analysts are passionate about their work and, as a result, need very little outside motivation. They are driven to solve problems and improve the way work gets done. They are naturally inquisitive and love to learn new things. Functional managers who are able to direct this passion and energy will achieve significant organizational improvements.

This presentation is derived from a chapter of the newly released IIBA® publication, *Managing Business Analysts*. While managing BAs can be similar to managing other employees in many ways, BAs by nature have unique characteristics and thrive under effective management support. Managers who want to maximize the potential contributions of BAs to their organization should create a productive work environment, make appropriate work assignments, oversee planning, and encourage professional growth by coaching and monitoring progress.

You will learn:

- Understand the unique characteristics of business analysis professionals
- Provide a conducive BA work environment
- Make appropriate matches between work assignments and people
- Get clear agreement and work plans at the beginning of an assignment
- Monitor progress, coach, and encourage BAs along the way



Barbara A. Carkenord, CBAP® – *RMC Project Management*

Barbara A. Carkenord has more than 25 years of experience in business analysis, and is one of the original founders of the Business Analysis training industry. Barbara has an MBA from University of Michigan, is a Certified Business Analysis Professional (CBAP®) and a certified Project Management Professional (PMP®). She is also the author of the worldwide best-seller *Seven Steps to Mastering Business Analysis*, and is a frequent speaker at industry conferences and chapter events. Actively involved in the IIBA, she was a core team member of the IIBA BABOK® creation committee and contributed to its book, *Managing Business Analysis*. In 2010, Barbara was named Small Business Woman of the Year by the Georgia Women in Technology Association.

Barbara possesses detailed knowledge and experience in many analysis tools and techniques. She develops and delivers business analysis training using proven techniques and real-world experience. Barbara's areas of expertise include business analysis, software design, quality assurance, and project management. Her experience covers many industries including insurance, banking, and manufacturing. Her newest book, *CBAP® Exam Prep*, is scheduled for release in mid-2012.

Strategic Thinking for Today's Business Analyst

Presented by Susan K. Heidorn, Ed.D.

Business analysts need to be more than order takers for requirements; they need to be asking questions about the value of those requirements to the business. They also need to be constantly looking for ways to uncover value for the organization and ensure any effort aligns with the organization's strategic efforts. This presentation will provide the participant with an understanding of strategic thinking, as well as applying a few simple tools that support strategic thinking and learning to avoid the most common strategic thinking pitfalls.

You will learn:

- Understanding strategic thinking and why it is important to business analysis
- Learn the key elements that lead to strategic thinking and change the way you think
- Practice a few key tools that supports your strategic thinking efforts
- Identify common strategic thinking traps to avoid.



Susan K. Heidorn, Ed.D. - Anderson, Heidorn & Associates, Inc.

More information about Susan is coming soon.

Scope Clairvoyance: Determining what's needed. Deciding what's important.

Presented by Christian Milaster

"Hindsight," the saying goes, "is 20/20." Imagine if could you systematically define the solution requirements of your projects with 20/20 vision at the outset? What if you could have Scope Clairvoyance?

As Business Analysts our contributions drive the planning of projects. But without an accurate definition of the project's solution scope, excellent project plans still will just build the wrong thing faster and cheaper. Whether you call it scope planning or scope definition, business analysis or needs analysis, requirements development or solution design -- the most critical activity at the beginning of any project is to figure out what's really needed and which of those needs are really important.

- People don't know what they don't know. -- What if you could help stakeholders see their real needs?
- People prioritize subjectively. -- What if you could help stakeholders see priorities objectively?
- People learn slowly from the past. -- What if you could help stakeholders see their learnings from the past?
- People stop planning too early. -- What if you could help them to see when they are done planning?

In this presentation, Christian Milaster will share a simple yet scalable requirements information taxonomy for identifying and managing the various types of requirements information such as vision statements, success criteria, strengths & weaknesses, business needs, quality attributes, functions, and specifications.

You will learn:

- How to systematically organize the plethora of requirements information that is discovered and elicited
- How to systematically identify all relevant stakeholders
- How to systematically, with confidence, discover the most important needs from the most relevant stakeholders,
- How to systematically bring solution- or design-focused conversation back to the definition of the scope boundaries
- How to know, using objective criteria, that elicitation is complete



Christian Milaster- Mayo Clinic

Christian Milaster is a certified Project Management Professional (PMP) with over 12,000 hours of project management experience who has developed requirements since 1987, and is pursuing CBAP certification. Christian has worked at IBM Global Services in Germany and Canada, at Huntington Banks in Ohio, and at the Mayo Clinic in IT and Engineering since 2000. He is currently the Program Manager for Telemedicine in the Mayo Clinic Division of Engineering where he and his colleagues design and build unique one-of-a-kind devices and solutions for Mayo's physicians, researchers, and—ultimately—Mayo's patients.

Christian lives with his wife and daughters in the beautiful town of Lanesboro in a modern yet extremely energy-efficient house that he designed and helped build. He is the past chair of the Rochester Area Quality Council board, a past member of the Minnesota Council for Quality Board of Directors, a past Minnesota Quality Award evaluator, and also serves on the board of the Eagle Bluff Environmental Learning Center and the Dreamery Rural Arts Initiative.

Fantastic Voyage or the Impossible Dream?

The BA as Management Consultant

Presented by Rich Larson, PMP, CBAP®

The Business Analyst role is more than being a business expert, or extracting requirements, or documenting what stakeholders say they need done on projects. As the BA profession evolves, it seems easier to define what role we *don't* want to play than what our role should be. Most BAs would prefer to be seen as valued problem-solvers and trusted advisors to both business and IT stakeholders. This presentation explores the need for Business Analysts to work towards a management consultant or "trusted advisor" role and how to realistically get there.

The business world and maybe even our own Business Analysis profession itself do not always know what to do with us BAs. Are we business experts who can communicate with IT and thereby translate business needs into requirements for projects? Are we IT-savvy professionals who can talk enough in business terms to extract more than superficial needs and requirements of our business partners? Are we order-takers, destined to dutifully record what stakeholders say they want on projects, then take the blame when projects don't deliver what they are supposed to?

Or, is there another role, one in which business analysts collaborate with business and IT in a consultative way? One in which we act as trusted advisors to both business and IT stakeholders. One in which BAs are seen as management consultants, helping the business solve problems and contribute as valued partners, uniquely positioned to make the most impact.

This presentation explores the need for Business Analysts to work towards a management consultant role and how to get there. It walks through a repeatable framework that can help Business Analysts perform their role in a consultative way. One of the main facets of the presentation covers influencing without authority and how BAs can achieve more influence, and thereby be seen and accepted as management consultants. It ends by sharing a core set of consulting principles that help set internal consultants apart from ordinary workers.

After this presentation you will be able to:

- Cite the 3 types of consultants in organizations.
- Describe a repeatable approach and principles that can be used to function as a management consultant in any organization.
- Apply an influencing "formula" to all Business Analysis work that will contribute to success as a management consultant.



Richard Larson, PMP, CBAP® - Watermark Learning

President and Founder of Watermark Learning, Richard Larson has over 30 years of experience in business analysis, project management, training, and consulting. He has presented workshops and seminars to over 10,000 participants on 4 different continents.

Rich is a frequent speaker at Business Analysis and Project Management conferences and IIBA® and PMI® chapters around the world. His articles have appeared in BA Times, Project Times, Modern Analyst, RQNG, and related publications.

Richard was the Review Chair for the Business Analysis Body of Knowledge version 2.0 and co-lead for the Collect Requirements chapter of the Project Management Body of Knowledge, 4th edition. He and his wife Elizabeth Larson have co-authored two books, *CBAP Certification Study Guide*, and *Requirements Planning*.

Are you ready to Make the Connection with BAs in the Twin Cities?

Don't miss out on your chance to learn from these accomplished professionals – authors, trainers, CBAPs and industry experts.

**Space is limited to 400 attendees
register today at iibamsp.org.**

Is your company interested in participating in the Professional Development Day event?

Contact Sponsorship@iibamsp.org to secure your place in the Sponsor Showcase

Bring the Whole Team

Contact Sponsorship@iibamsp.org for group rates when you register five or more attendees.

