



Ottawa-Outaouais
Chapter

Presentation Recording

Optimizing your Role as a BA in Strategic Thinking and Design

Virtual Meeting
September 15th, 2020

Mary Daly



Webinar Outline & Objectives

Strategic Context



Strategic Thinking Models

Optimizing the BA Role



Liberate the word “strategy”



Share strategic thinking models



Start where you are



Activity highlights



Welcome & Introductions



1 Your Industry Sector

1. Federal Public Sector
2. Other public sector – health, education
3. Not for Profit / Association
4. Technology
5. Other



- ✓ Introductions
- ✓ A quick overview of the make-up of our webinar participants

Who are you and what do you do?



- 2 Your role – IC, Mgr, or Consultant
- 3 Pick a colour – years of BA experience
- 4 Your first name
- 5 Your company / organization
- 6 Your function / department

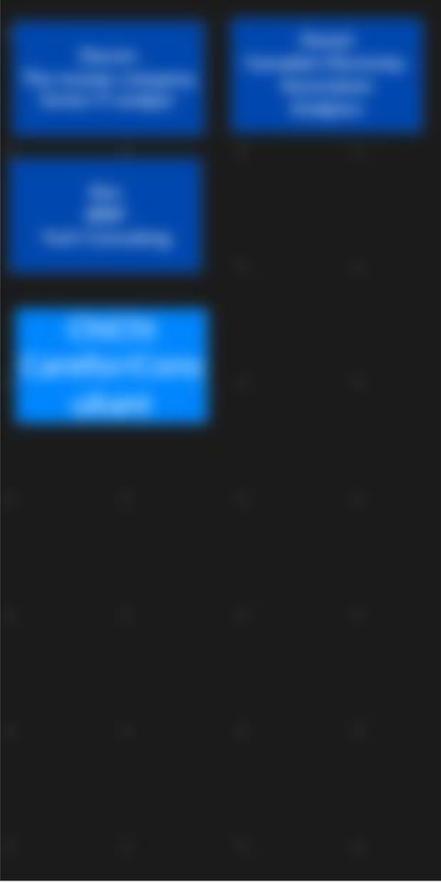
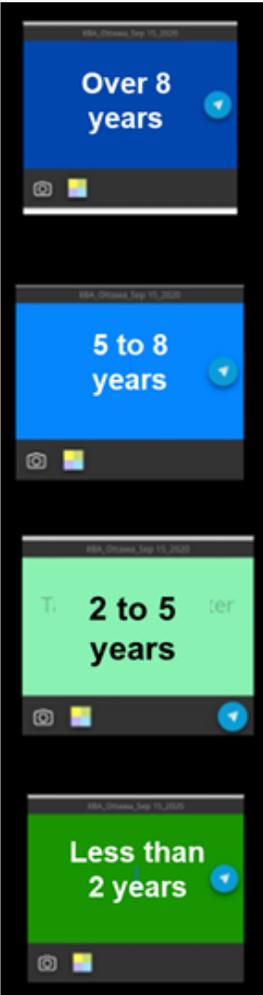


Overview of September 15th, 2020 Webinar Participants

Individual Contributors

Managers

Consultants



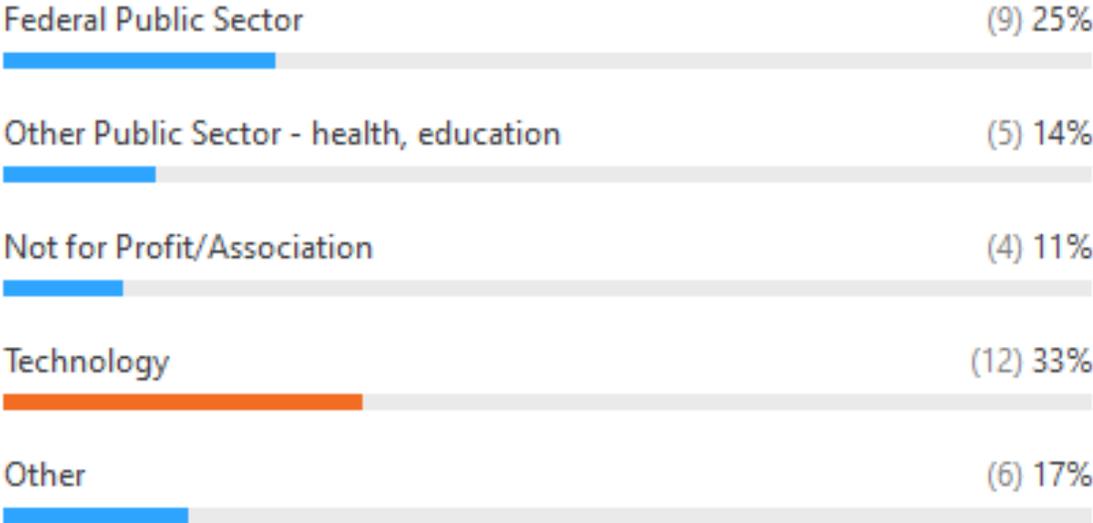
Plus a few



Attendees are now viewing the poll results

1 Your Industry Sector

1. Industry Sector

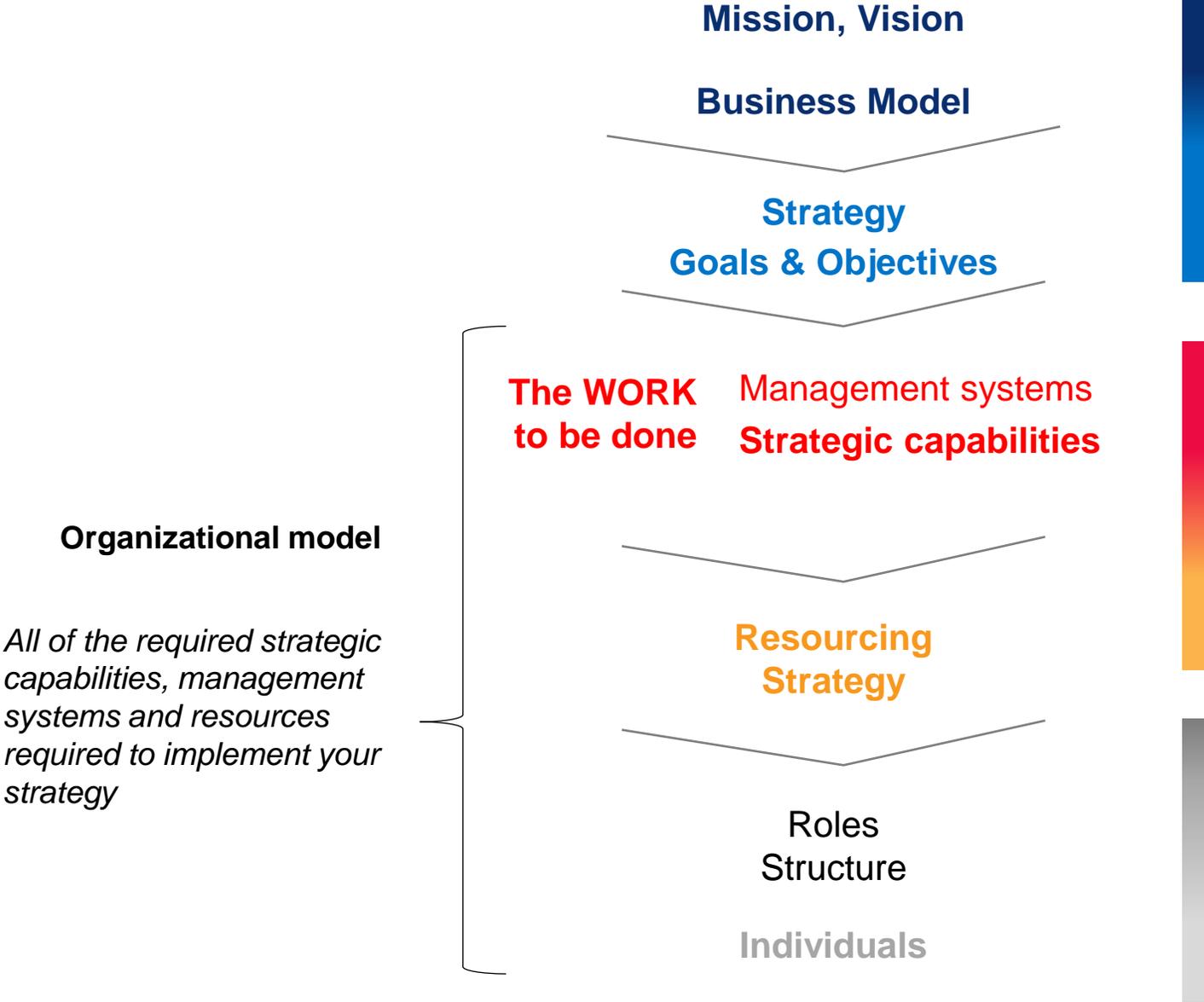


Strategic Context

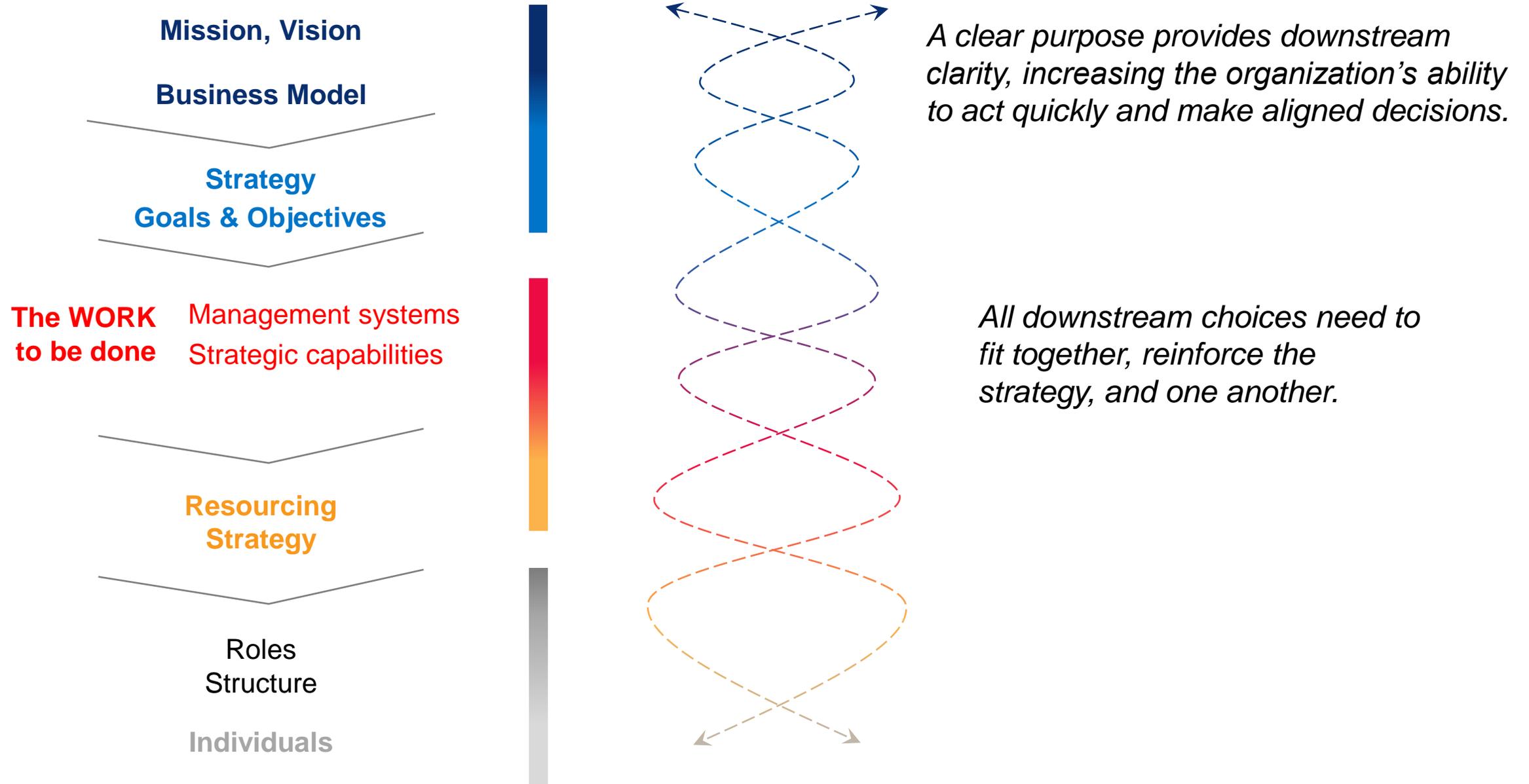


Designing for the Future

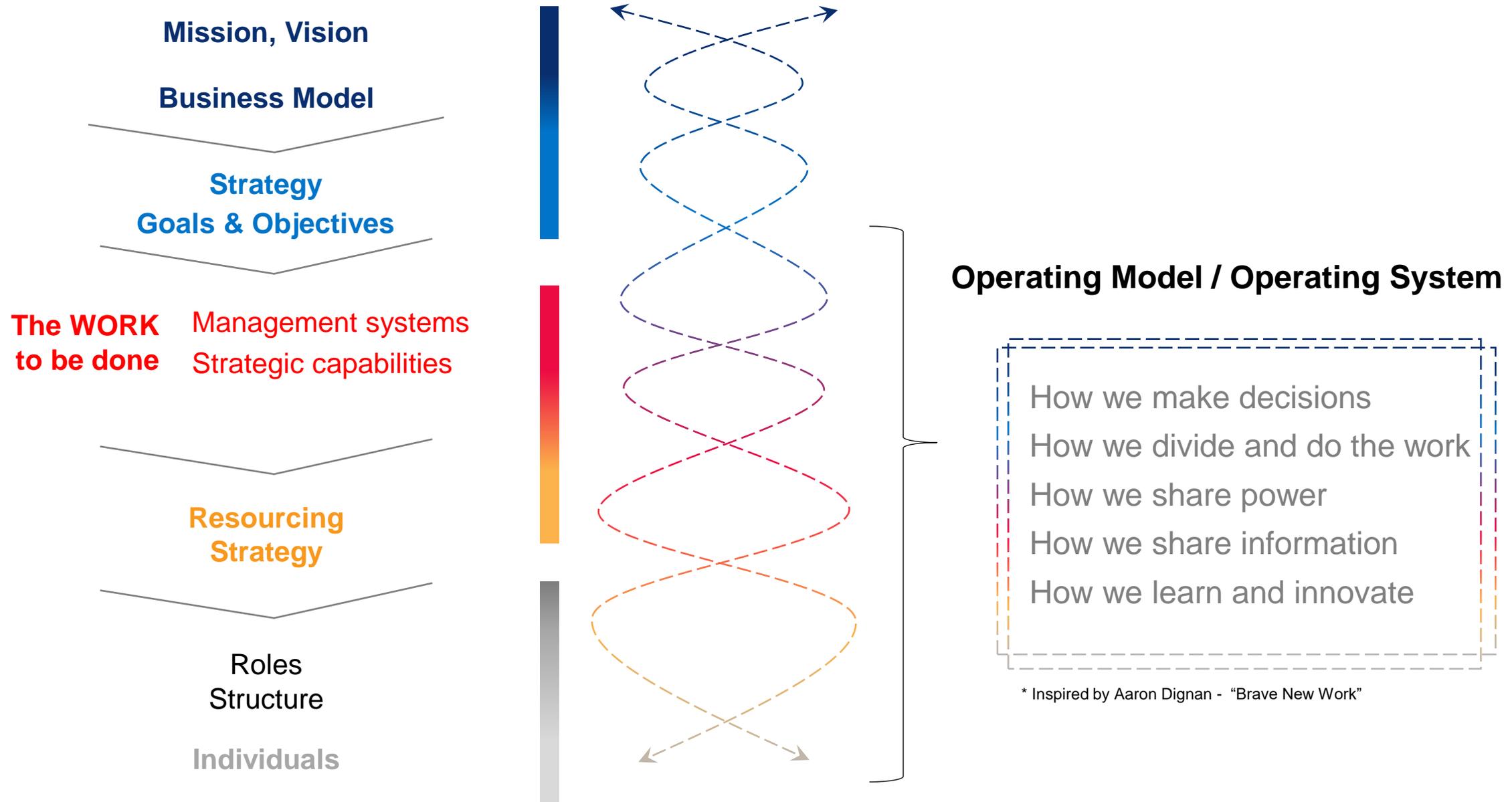
An Organizational Lens



Strategic Context



Strategic Context



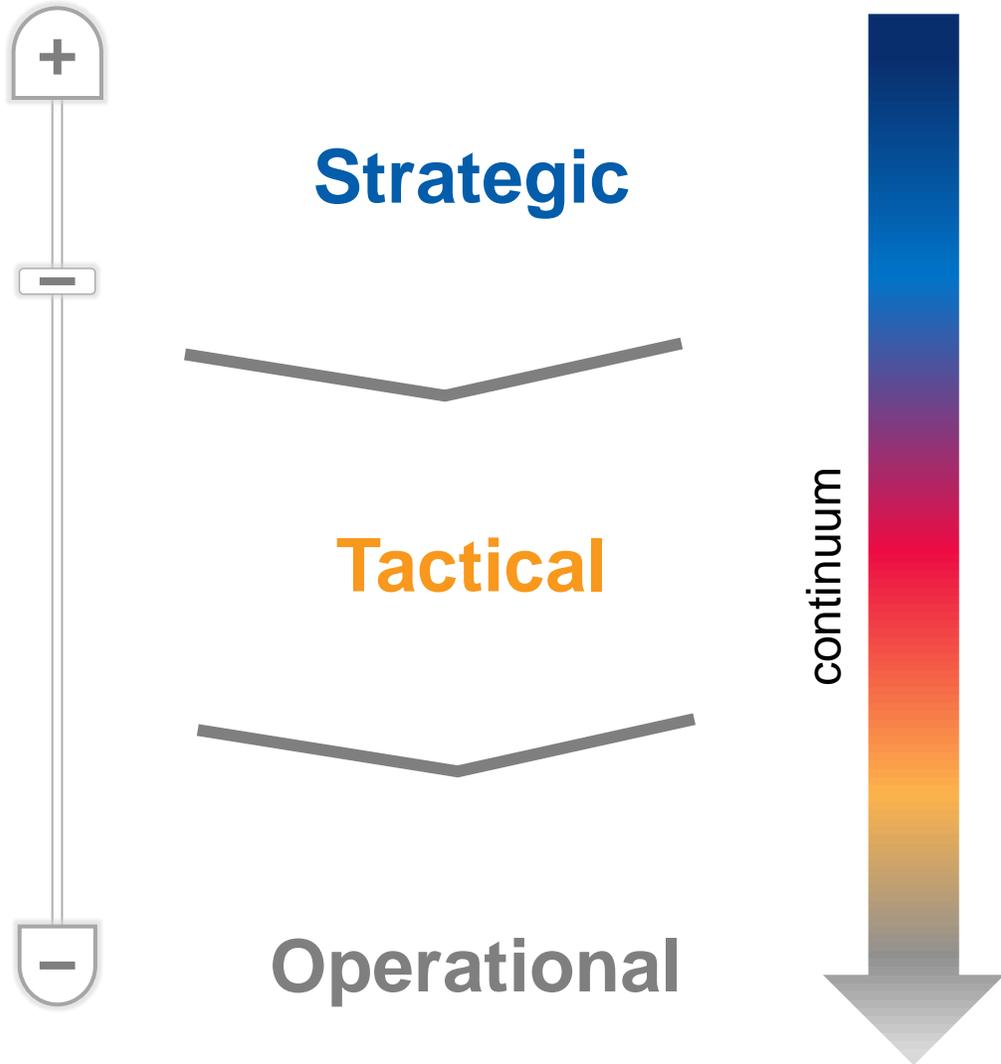
Strategic Context

“Strategy”

Strategy is about choices.

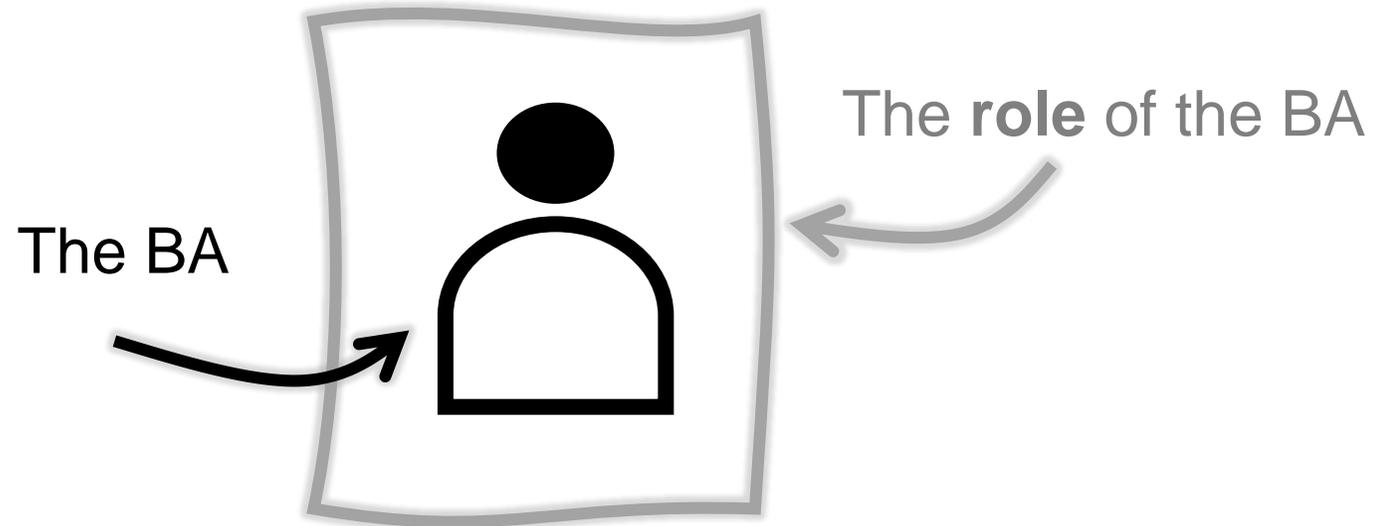
Choices are made at all levels of the organization.

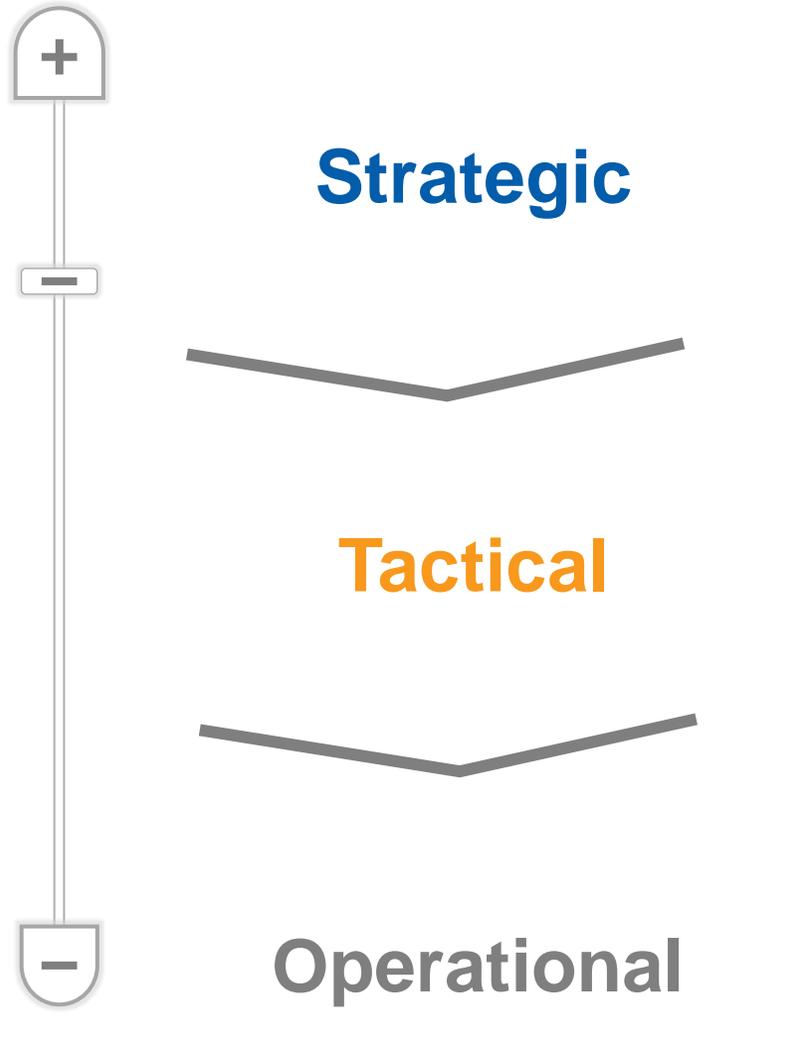




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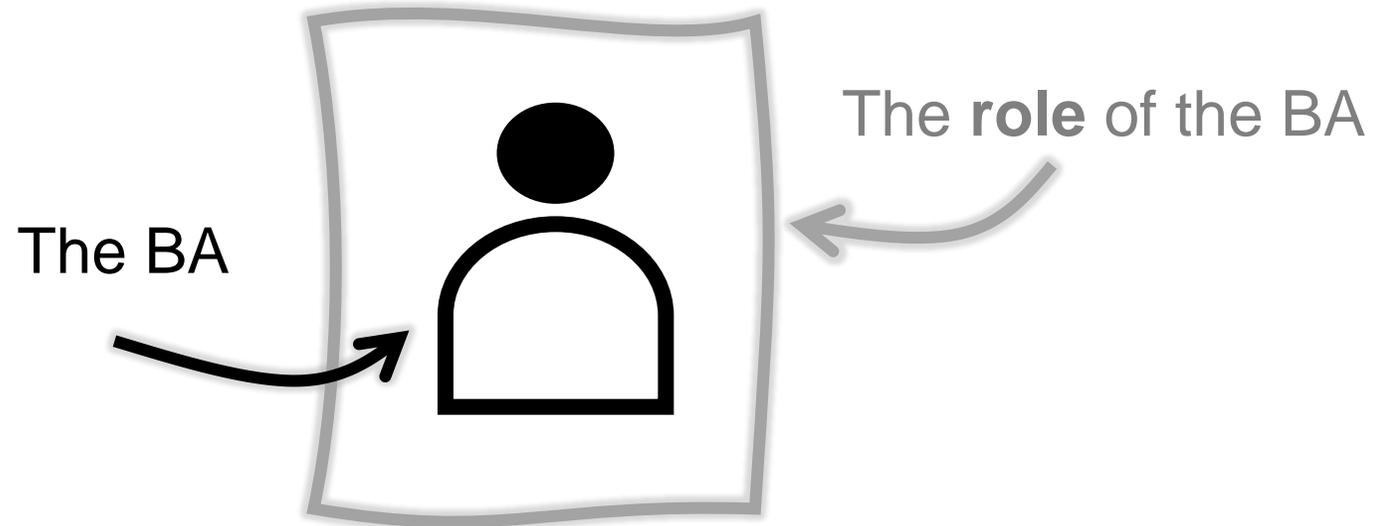
Choices (concrete and deliberate decisions) increase the probability of achieving vision & goals





“Strategy”

- Choosing what to do, and not to do
- Getting to the heart of what needs to be solved



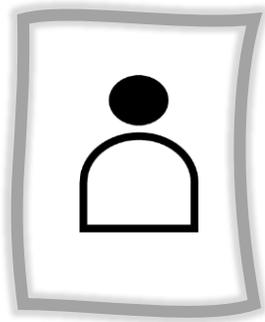
The Role of the BA



Business Analysts fill an essential role in bridging the gap between strategy development and its implementation

Business Analyst

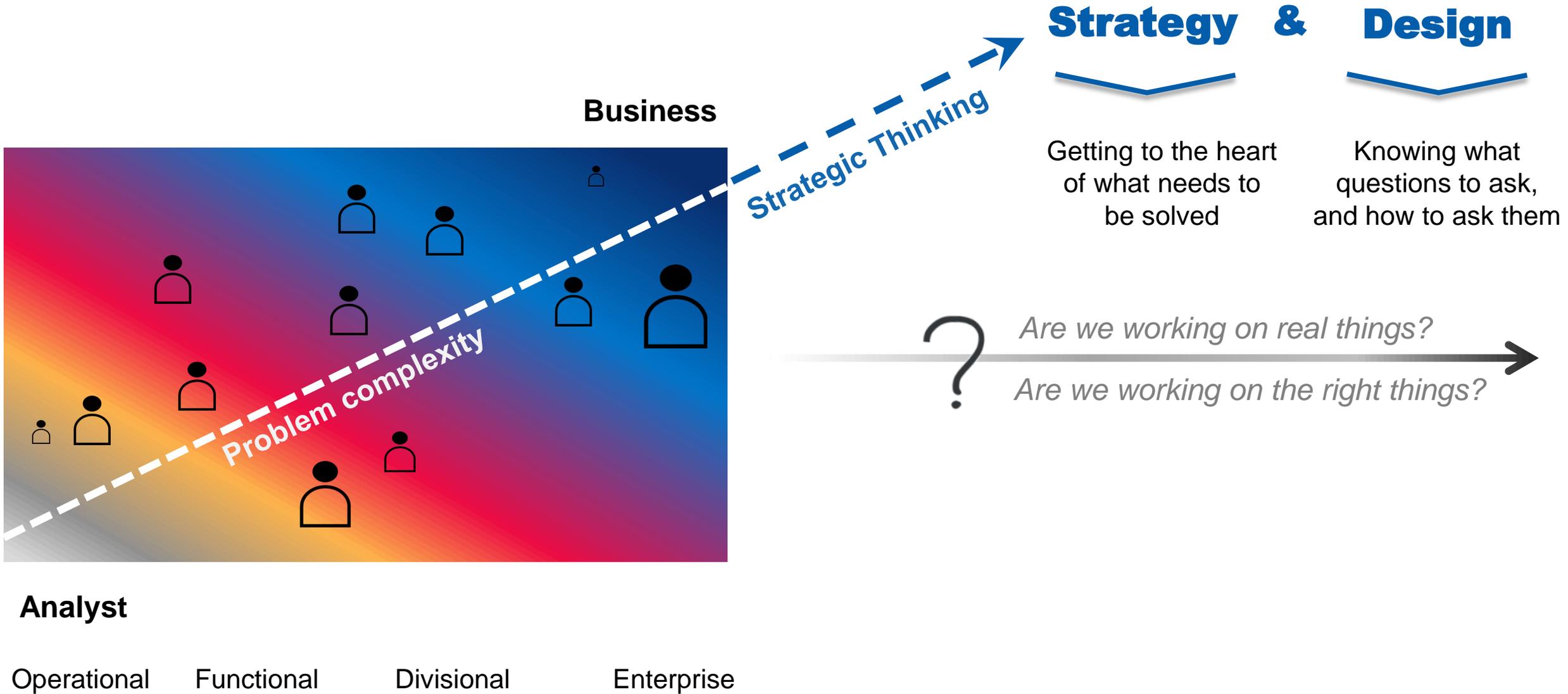
Business Analyst



Business **Analyst**

Business Analyst

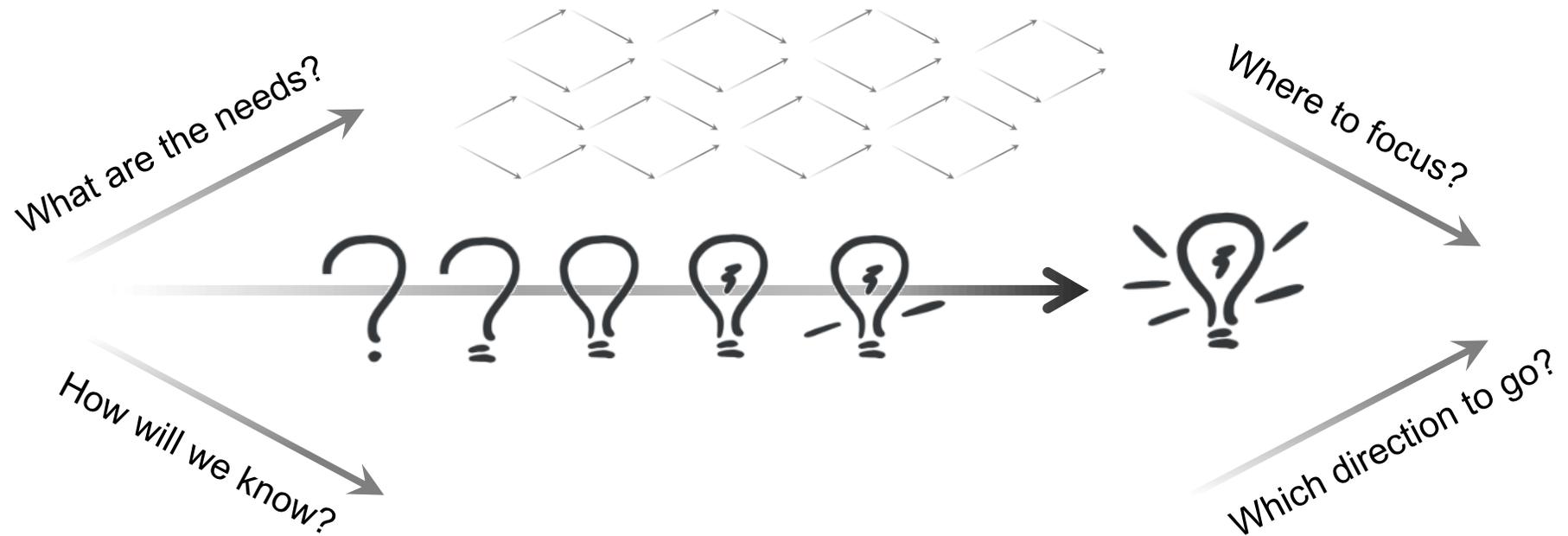
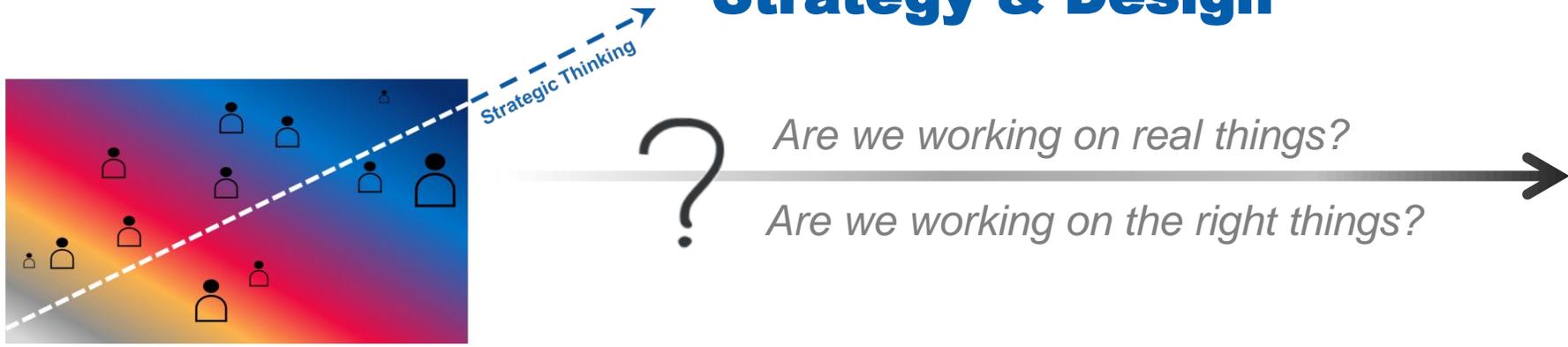
The Role of the BA



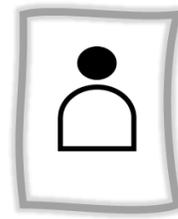
The Role of the BA



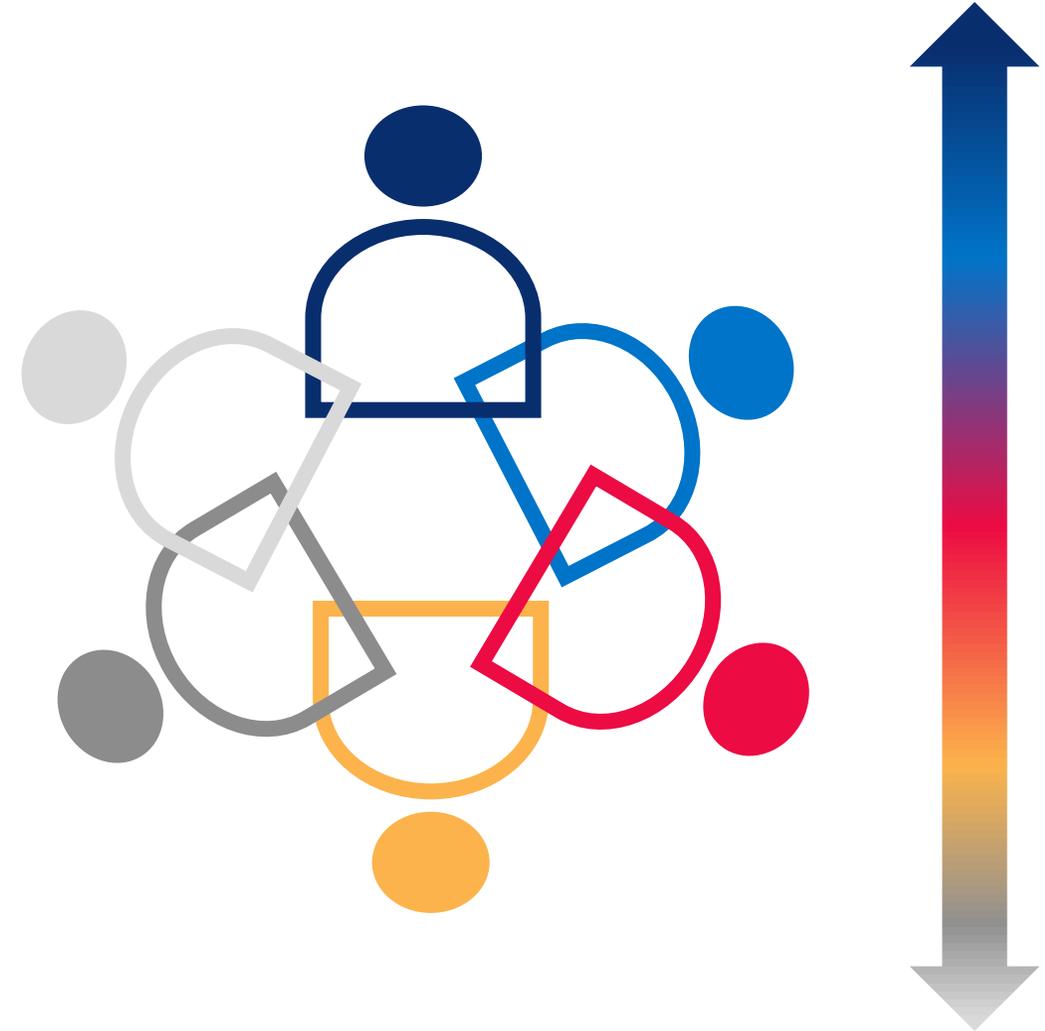
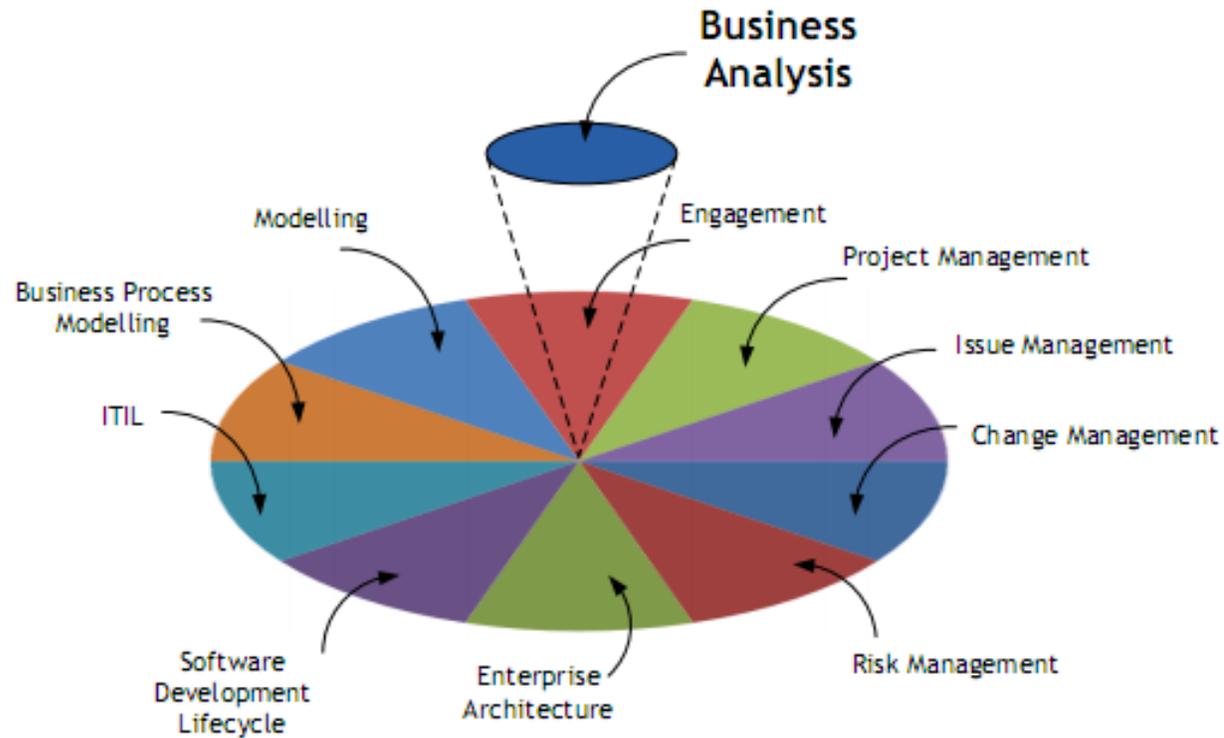
Strategy & Design



The Role of the BA



- Shaped person?



Why might a leader say "my people are not strategic"?

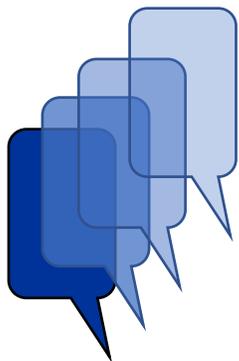
The people haven't been given the opportunity to demonstrate strategic skills	Not the same understanding of what strategic means	Focus on the tactical too much	Don't have a broad enough perspective	Fighting fires, too much work that is urgent	Too busy fire-fighting	Lack of experience	Strategy is not useful if it's not communicated
Don't see the bigger picture / business values	Not informed of major drivers/pressures	More rewards for not being strategic	Not engaged in strategic thinking discussion	People lack confidence to think about strategy	The leader doesn't recognise the potential of their people	Too focused on solutions and shiny toys	Solving a different problem
Lacking direction from key leaders	Get caught up in day to day priorities	Lack of training to think strategically	Can't see and incorporate the priorities of those other than their main group	Maybe the organization's strategy has not been filtered down	Could result in Sub-optimization	But I like shiny toy...	No Employee Engagement
I learned the need for a BA to be rounded	Too focused on operational / functional expertise	Don't agree with my ideas	not thinking long term	Don't know the employee's capabilities	They lose overall context	Half baked ideas	Don't thinking long term.
Not thinking long term and broad	Don't see the big picture	They're involve on operational tasks	They need to be open to inviting they people to the table to discuss at a strategic level	Not thinking long term	Working without the big picture in mind	No Leadership	
Too reactive as opposed to visionary	Nureva collaboration tool is great. Experiencing this for the 1st time. Thanks	I like, I like, I wonder...	Does not give opportunity to participate in the strategic planning	Do not see the big picture	Don't see the big picture	Not a team player	



Why might a leader say "my people are not strategic?"

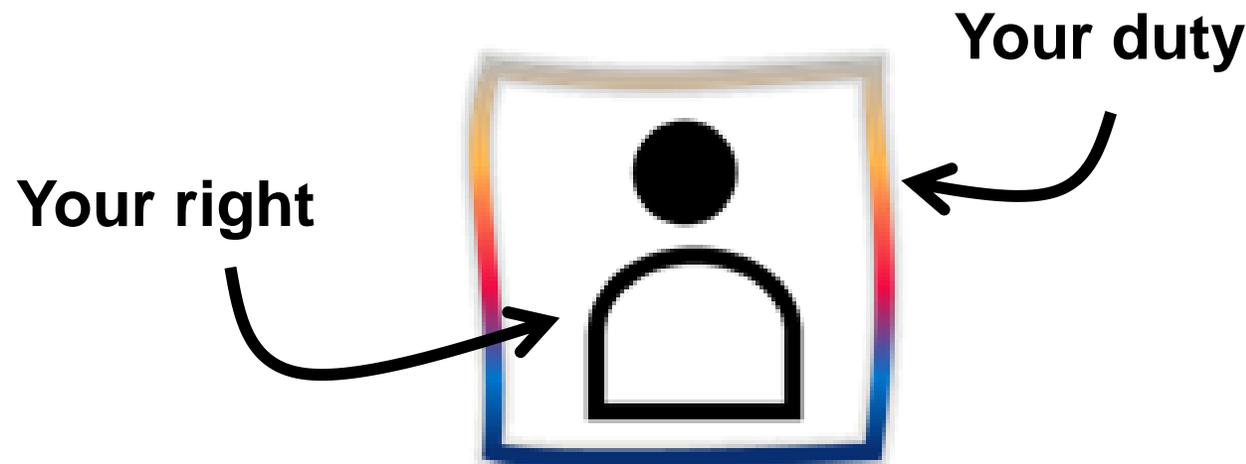
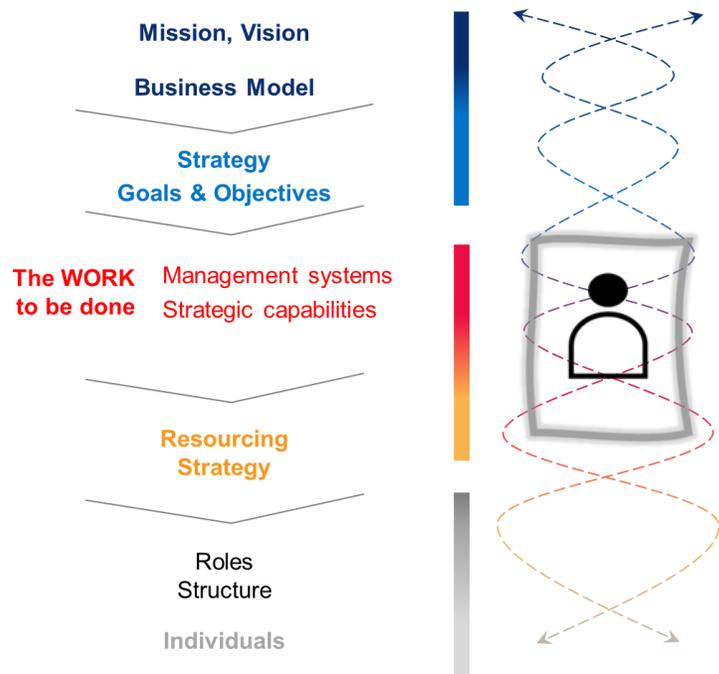
They don't see the big picture	Not the same as strategic thinking	Focus on the tactical too much	Can't think outside the box	They're too busy fighting fires	Too busy fighting	Lack of experience	They're not used to it
They're stuck in the details	The absence of a long-term vision	They're not thinking about the future	Solving a different problem				
They're not adding value	Get caught up in day-to-day priorities	They're not adding value	No Employee Engagement				
They're not adding value	They're not adding value	They're not adding value	They're not adding value	They're not adding value	They're not adding value	They're not adding value	They're not adding value
Not thinking long term and broad	Don't see the big picture	They're not thinking long term	They're not thinking long term				
Too reactive as opposed to visionary	They're not adding value	Not thinking long term	They're not adding value	They're not adding value			

What do leaders often mean when they say: “my people are not strategic”

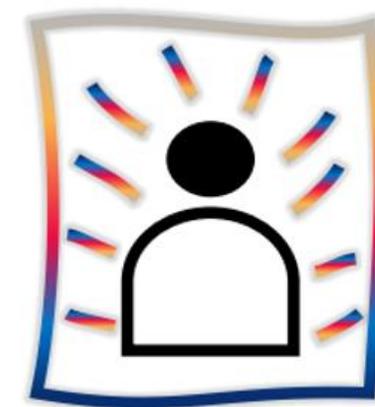


- They don't see the big picture
- They're stuck in the details
- They're wasting time on stuff that doesn't matter
- They are not adding value

The Role of the BA



- Look up
- Look ahead
- Look across
- Look outside
- Look inside



Your choice

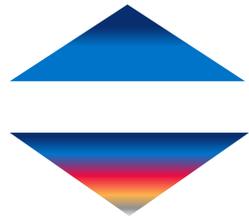


- ☹️ The boss
- ☹️ The culture
- ☹️ The systems
- ☹️ The resources
- ☹️ The tools

Optimizing your strategic role



- Look up
- Look ahead
- Look across
- Look outside



Strategic Thinking Models

The BA Role

Principle



Strategic Thinking



Craft



Agile Lean Design Thinking

Tools, Frameworks, LANGUAGE, Goals, Pace

- About deciding how to win
- Dynamically finding & solving the right problem
- Engaging everybody in continuous improvement
- Learning by doing

Optimizing your strategic role



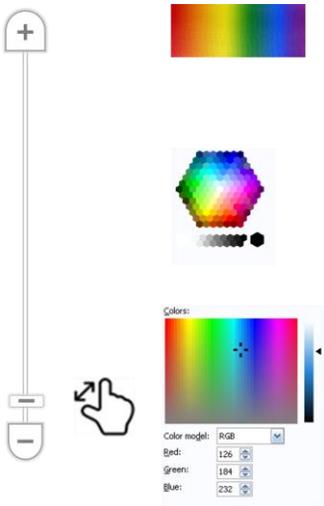
Strategic Thinking Models

The BA Role

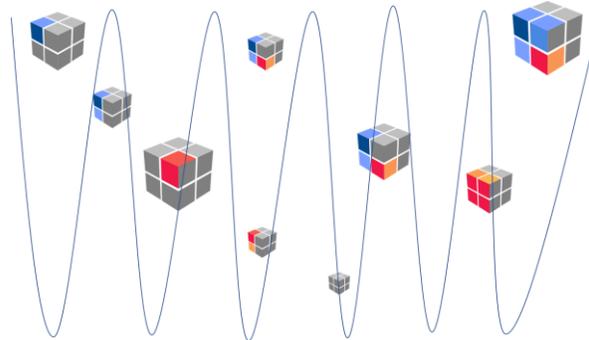


- Look up
- Look ahead
- Look across
- Look outside

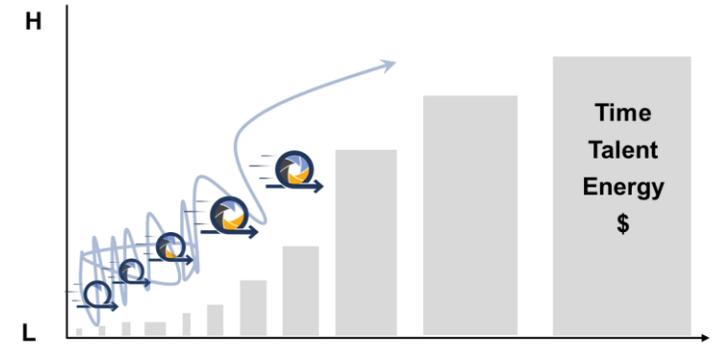
▲ Situate

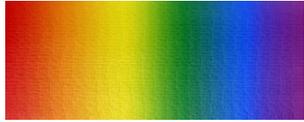


▲ Iterate



▲ Calibrate

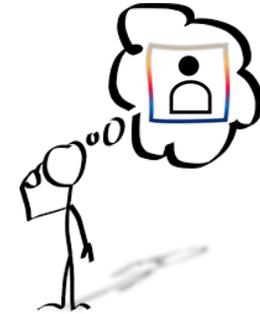




Toronto?



Ottawa?



Situate



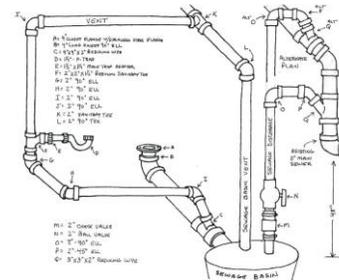
Colors:

Color model:

Red:

Green:

Blue:



- What was my role in this?
- What did I do to help them understand where I was coming from?



Situate



What?

zoom

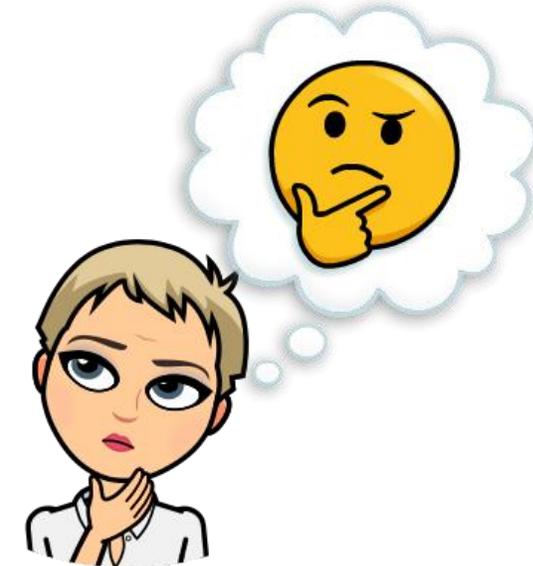
To: Everyone ▾

Type message here...

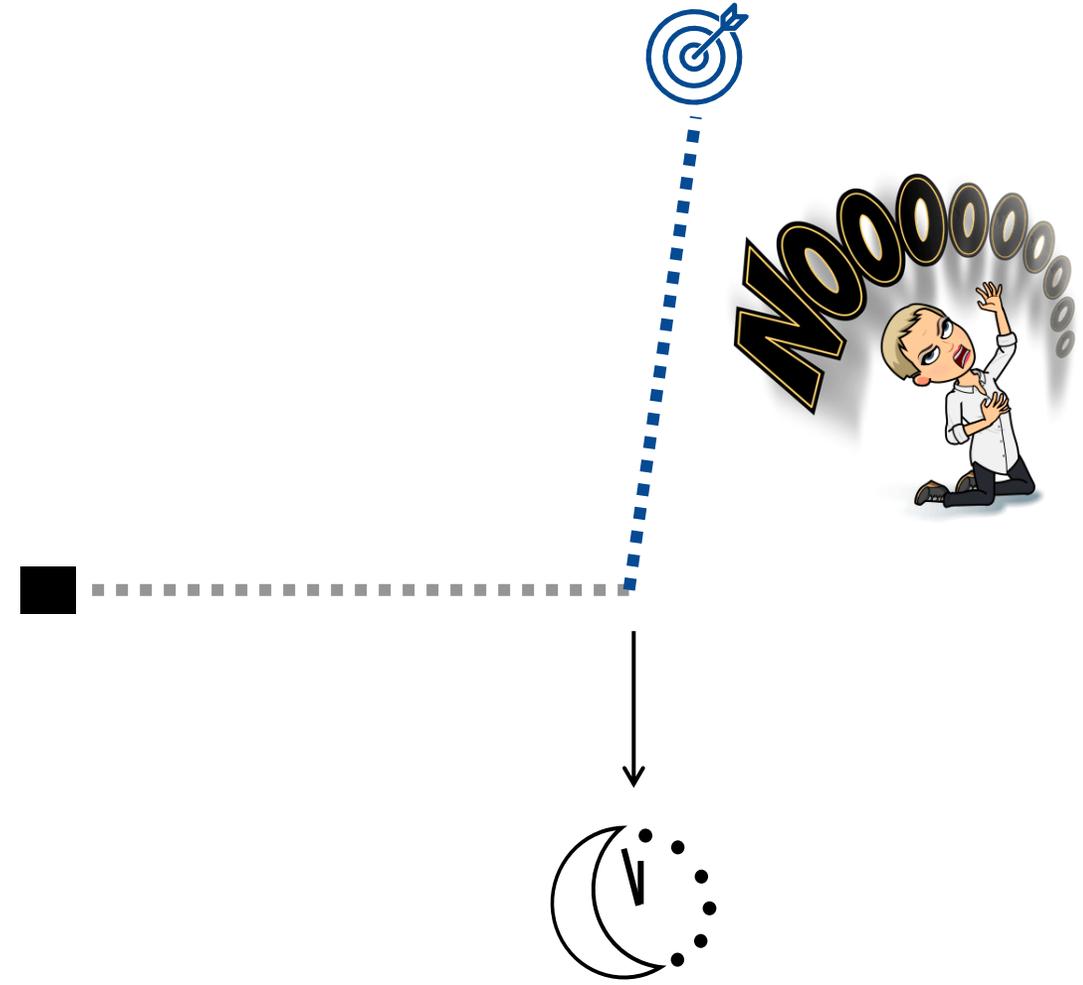
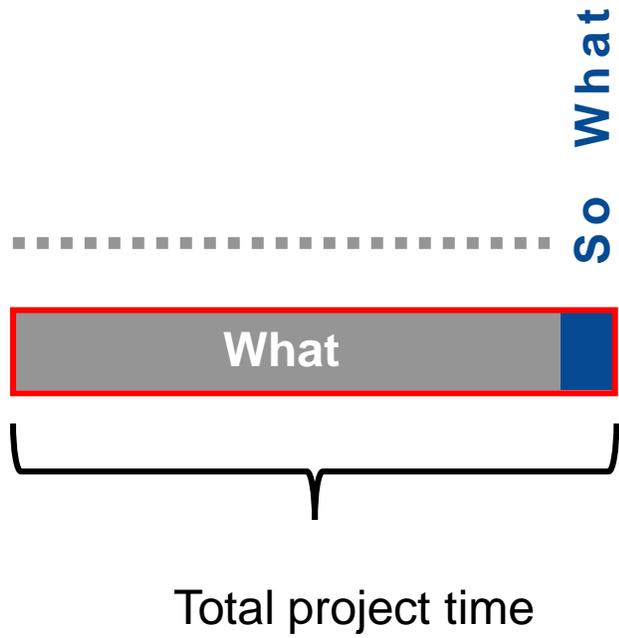
When 'someone' is deeply focused on the work at hand ... what could go wrong?



- Working on the wrong thing
- Wasting resources
- Missing the big picture
- Missing opportunities



What could go wrong?

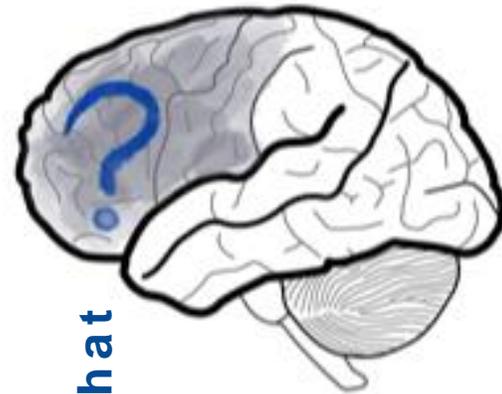




So What?

Situate

What?



So What



So What?



- Creating clarity
- Refining the 'why'
- Creating and sustaining the energy of the project and the team

Where does my piece fit into the bigger picture?

How does this serve our aspirations?

What is the change we wish to see in the world?

Why are we working on this now?

What is the risk if we do nothing?

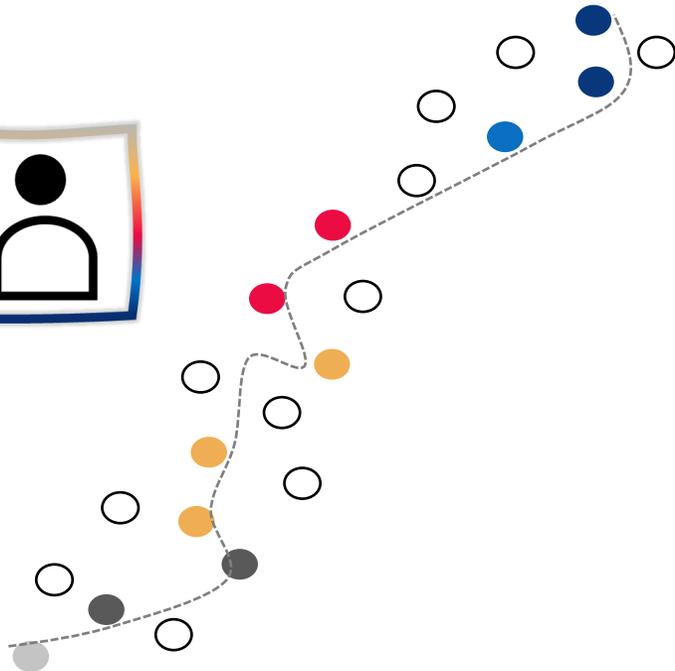
What is wrong that needs changing?

What outcomes are we shooting for?

Which client need does this solve?

What are the unmet needs of our clients?

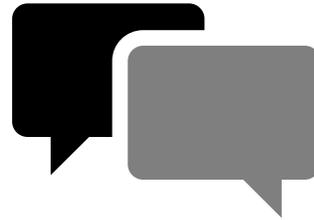
What are our steppingstones to success?



What?



Help me understand ...



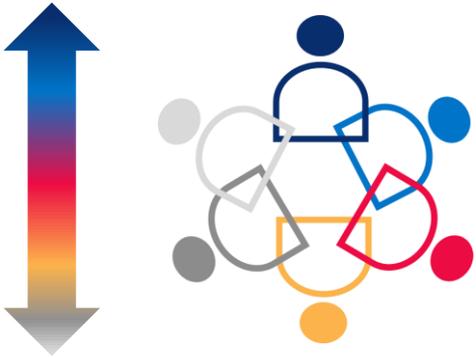
Prepare

- Do your research
- Do your thinking
- Have a point of view

- Ready to learn
- Strong beliefs, loosely held
- “Fight as if you were right, listen as if you were wrong”

Karl Weick

Optimizing your strategic role

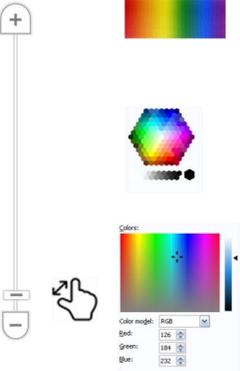


- Look up
- Look ahead
- Look across
- Look outside

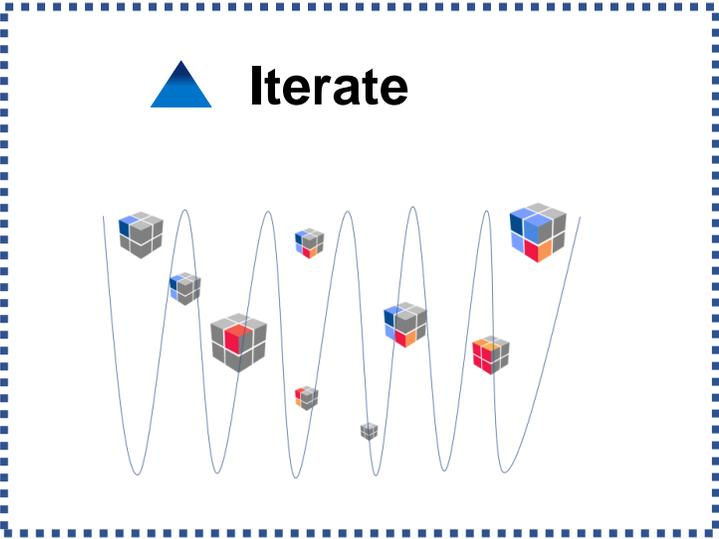


Strategic Thinking Models
The BA Role

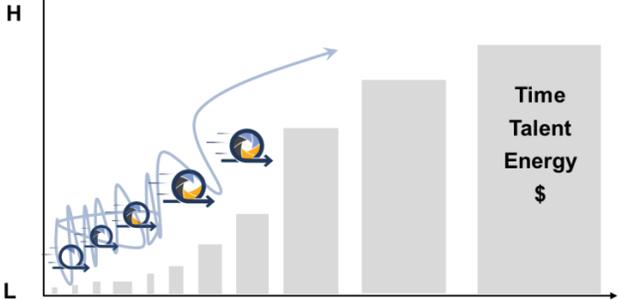
▲ Situate ✓



▲ Iterate

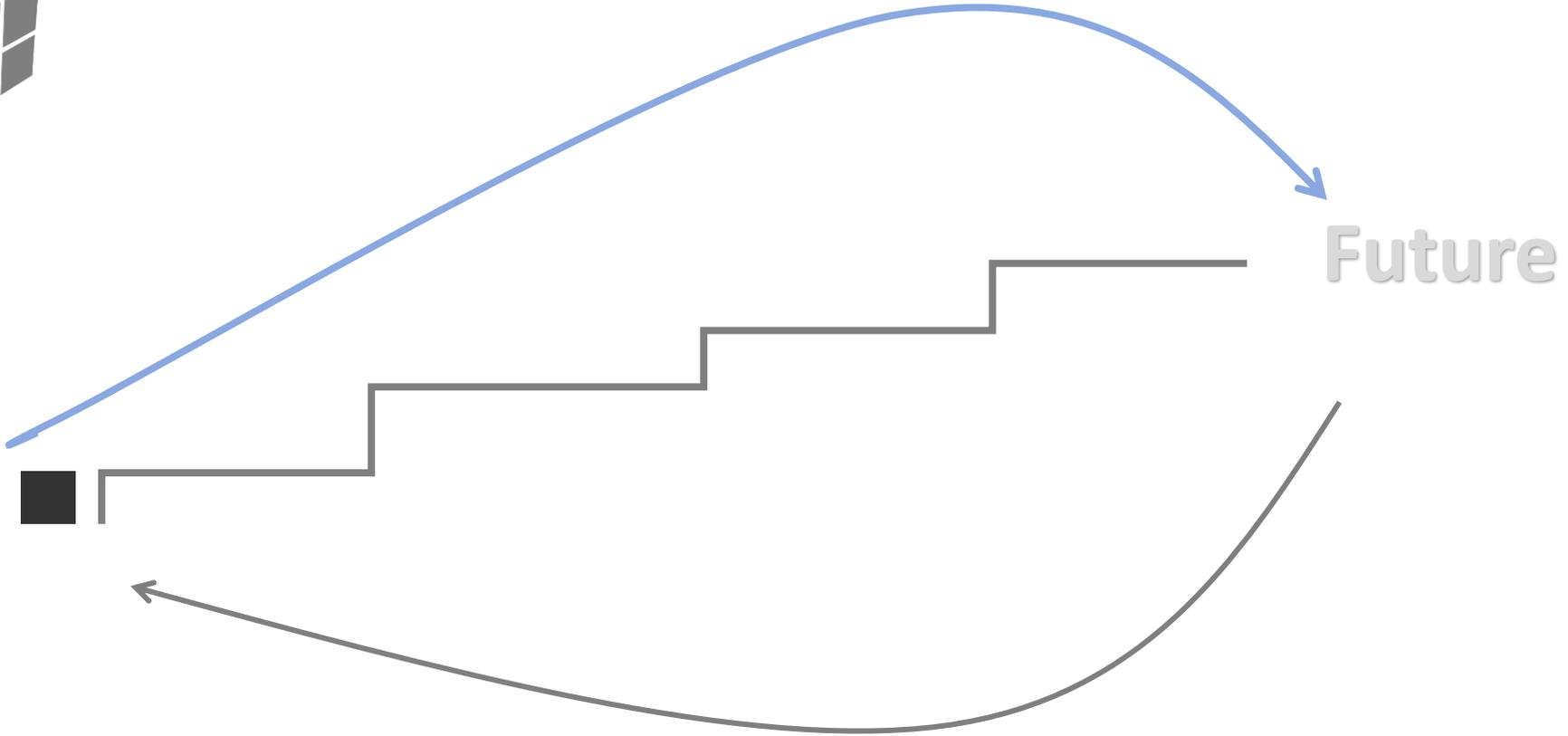


▲ Calibrate



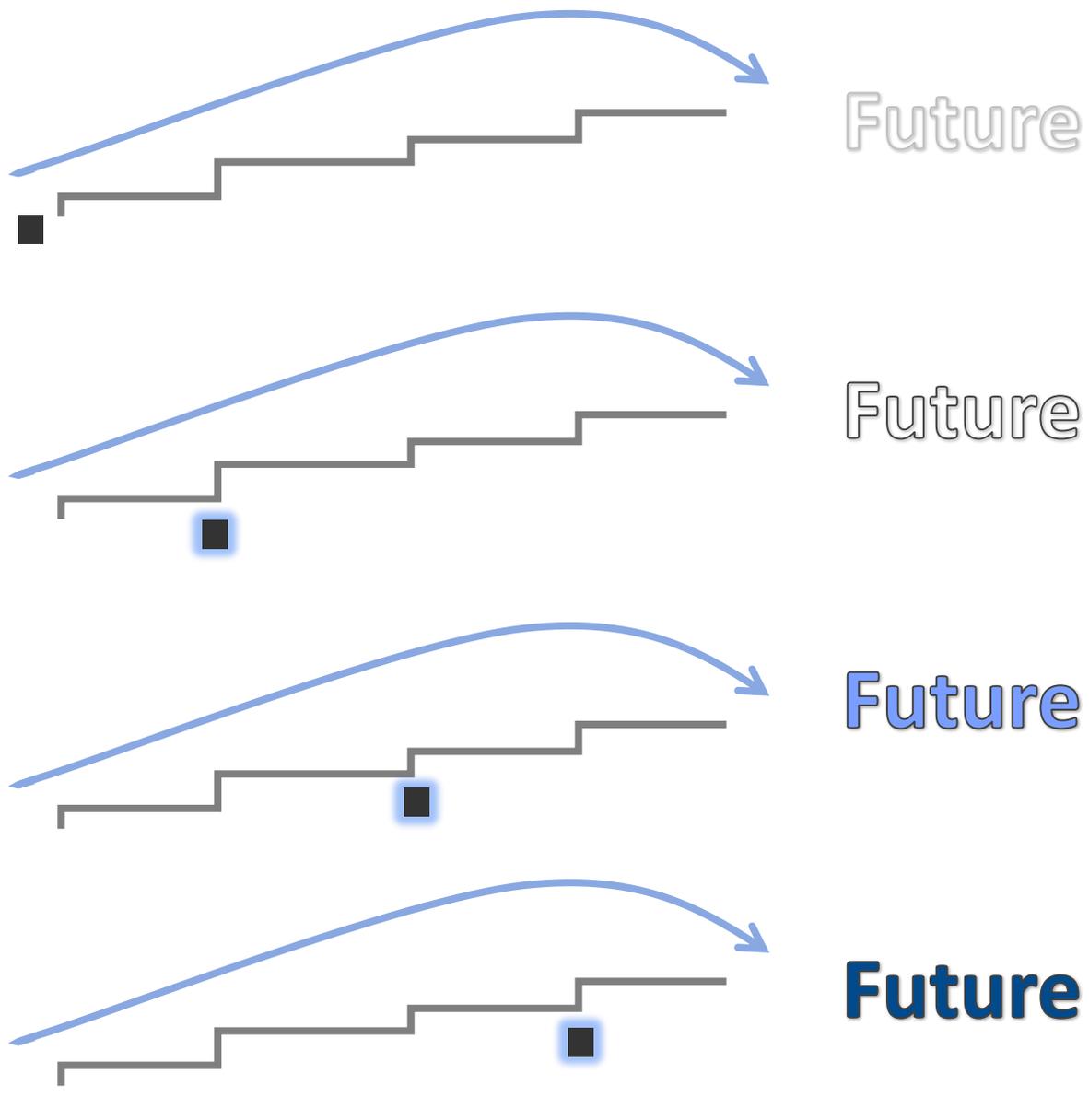
Strategy

Start at the beginning with the end in mind



Future

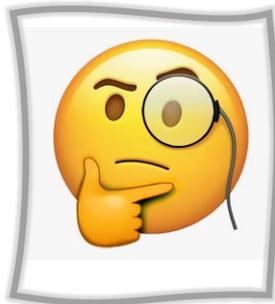
Iterate



Strategy



Execution



zoom

To: Everyone ▾

Type message here...

When you can't see the strategy clearly, what do you typically think?

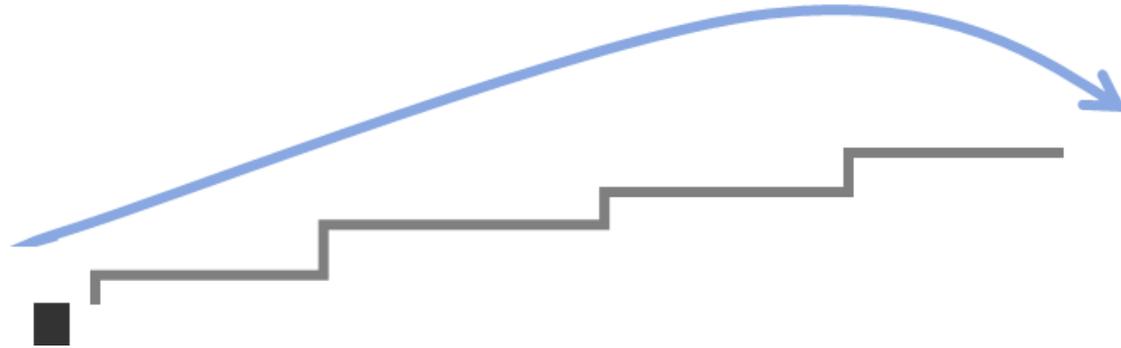
- That there is no strategy
- Lack of leadership
- Leaders are not communicating the vision
- What's the plan?
- It's a work in progress
- The strategy will very likely change
- Is it worth all of this work?



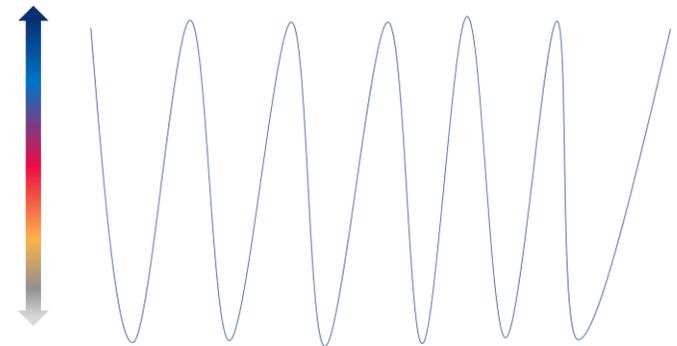
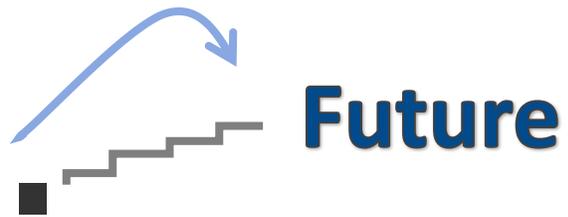
Strategy



The future is far
The farther away it is, the less clearly you can see it



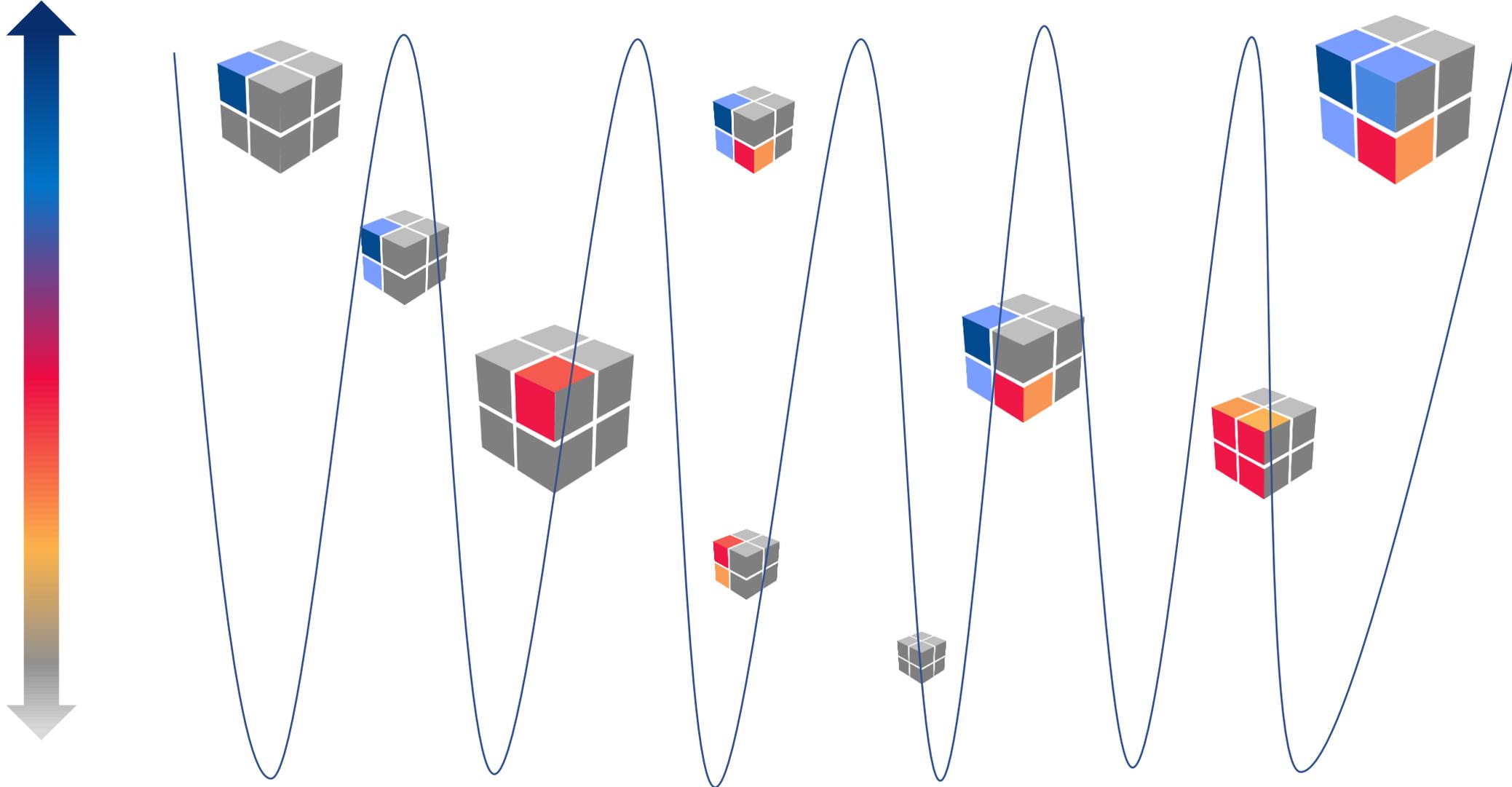
Future



Strategy

Strategy

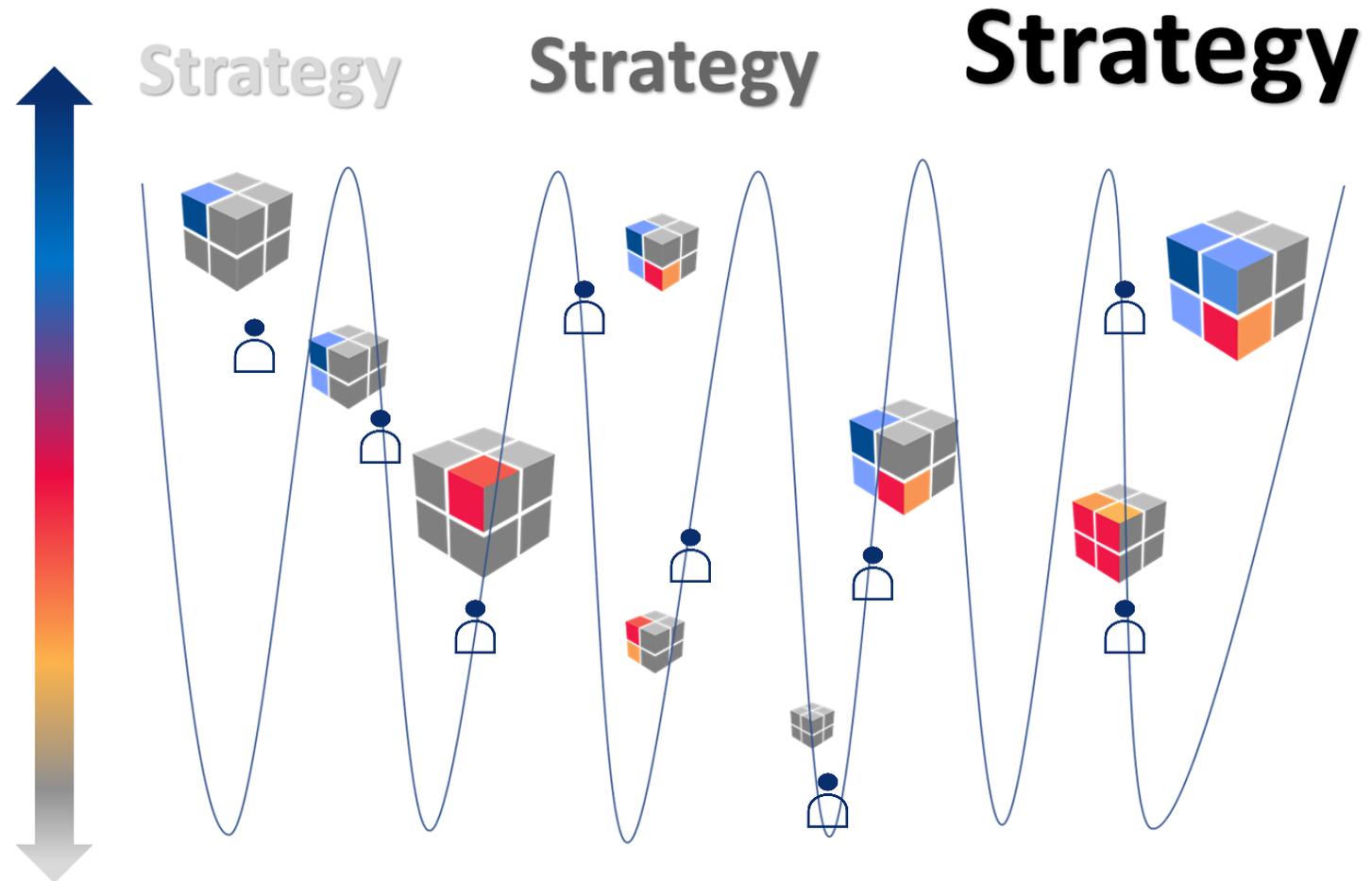
Strategy



Iterate

Optimizing your strategic role

- **Strategy** is an **integrated** set of **continuous choices** that are being made, assessed and remade on an ongoing basis



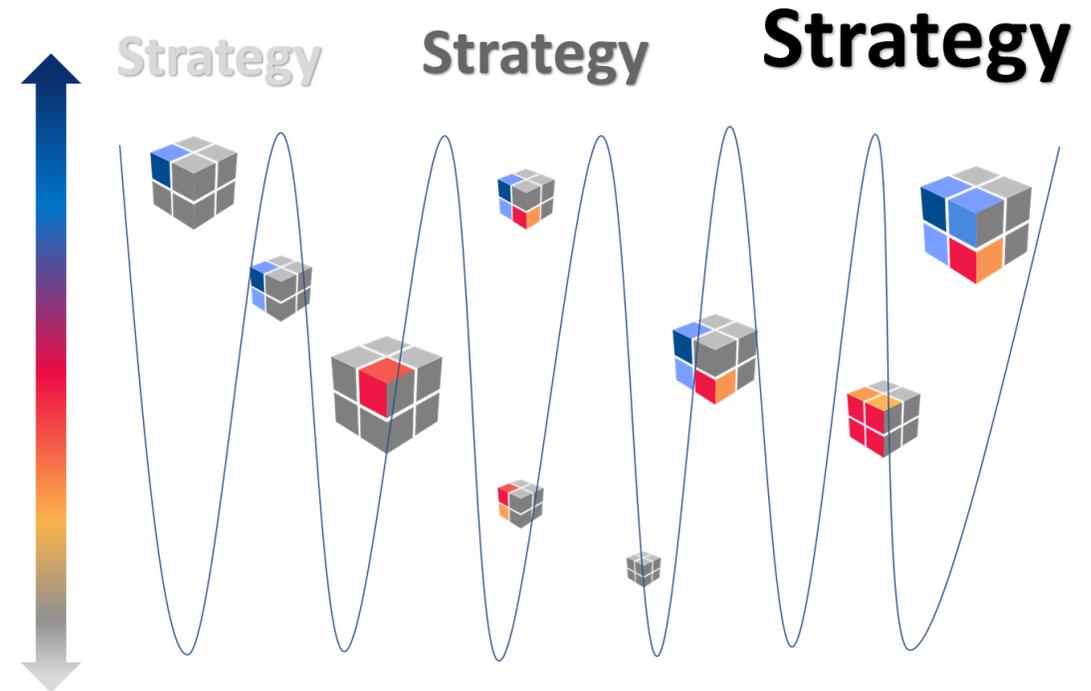
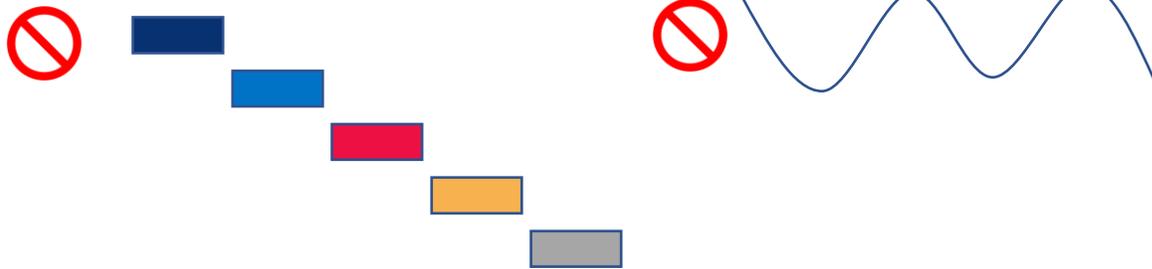
Your questions, your work, your tests, serve to *sharpen* strategy

Iterate

Optimizing your strategic role



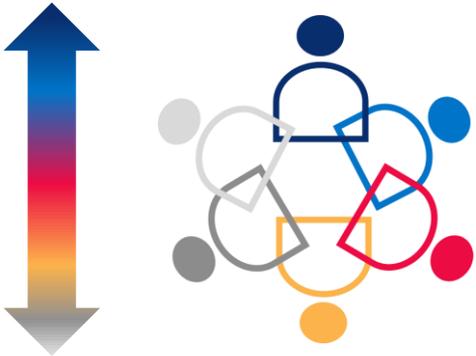
- Work *with* it, not against it



- What would have to be true for this to be the best choice?

Roger Martin

Optimizing your strategic role

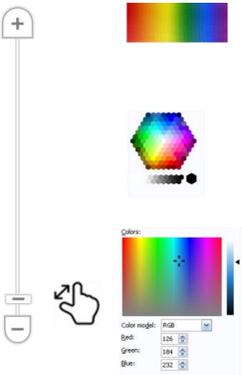


Look up
 Look ahead
 Look across
 Look outside

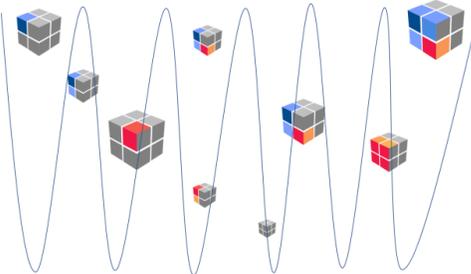


Strategic Thinking Models
The BA Role

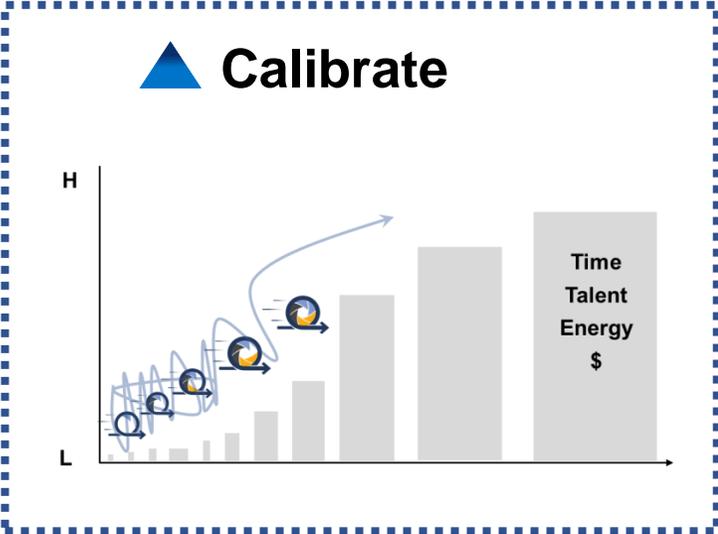
▲ **Situate** ✓



▲ **Iterate** ✓



▲ **Calibrate**

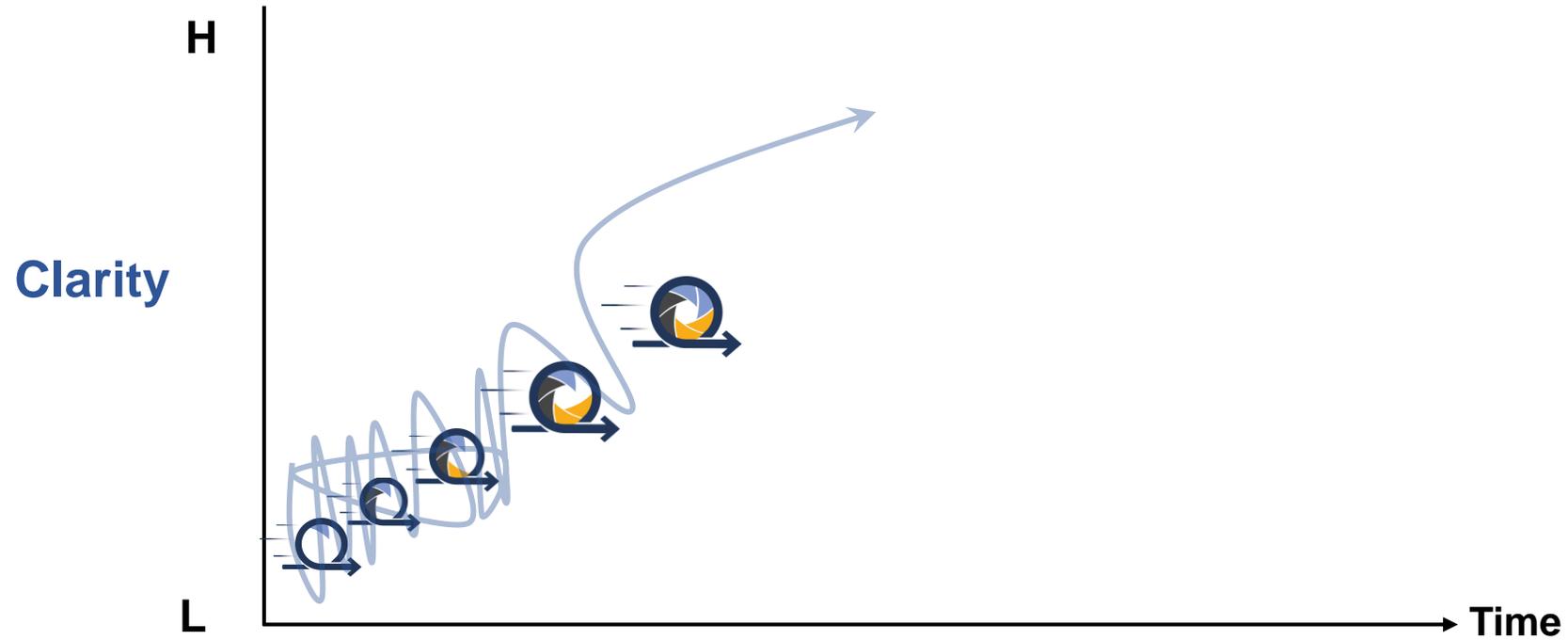


It's often messy to start



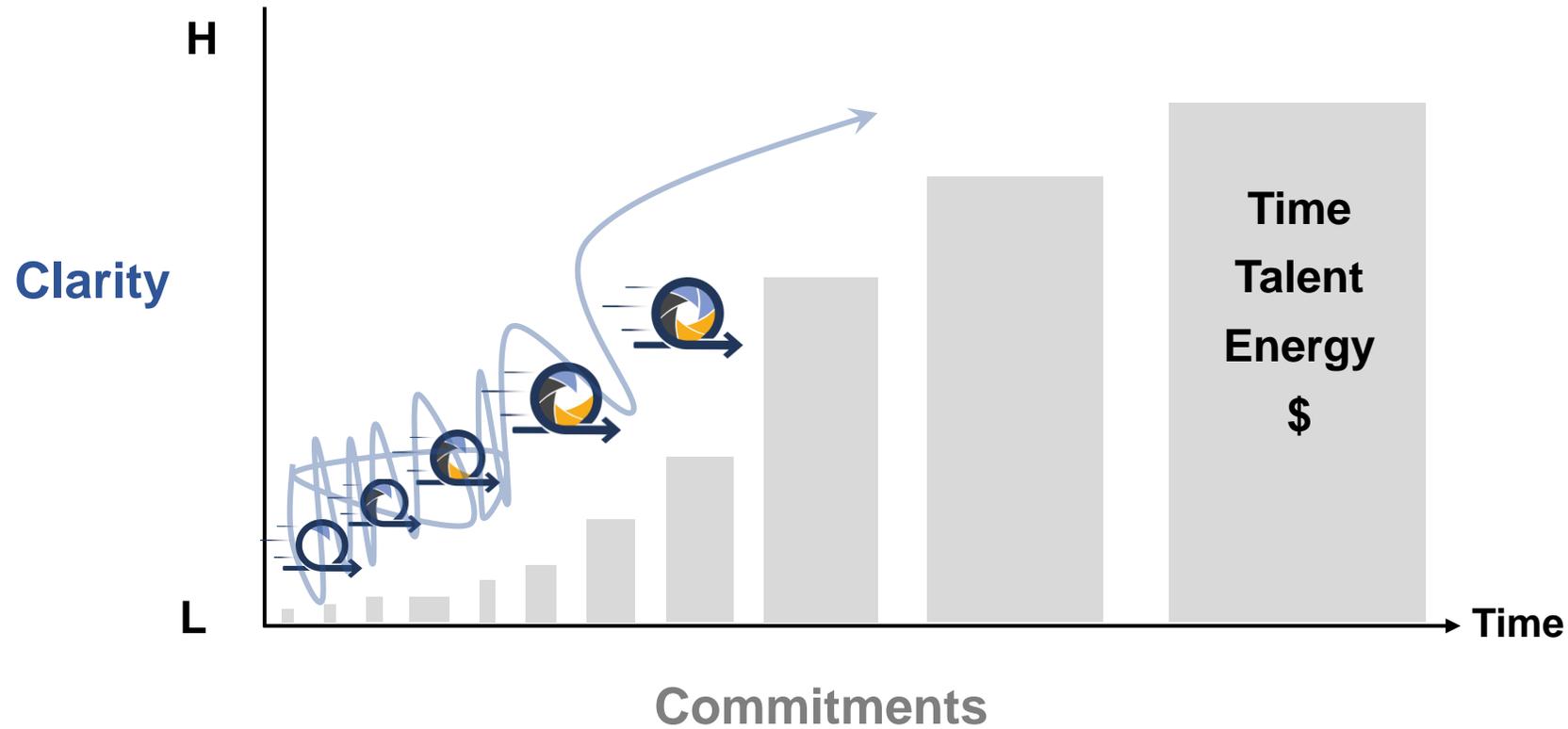
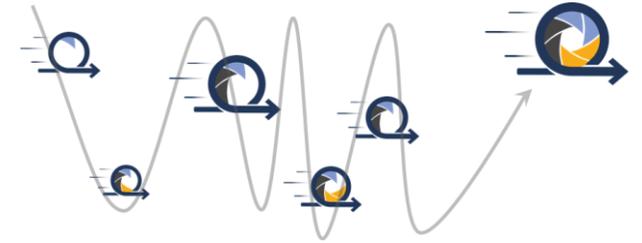
Calibrating

- Learn by doing
- Learn and sharpen as you go



Calibrating

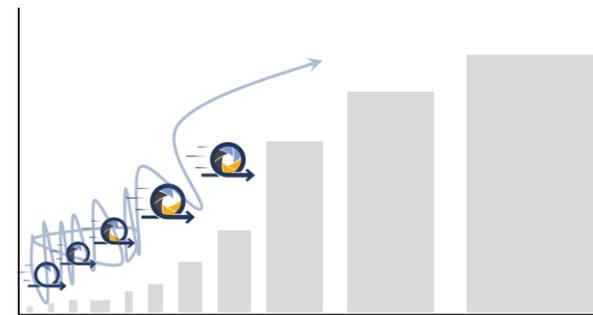
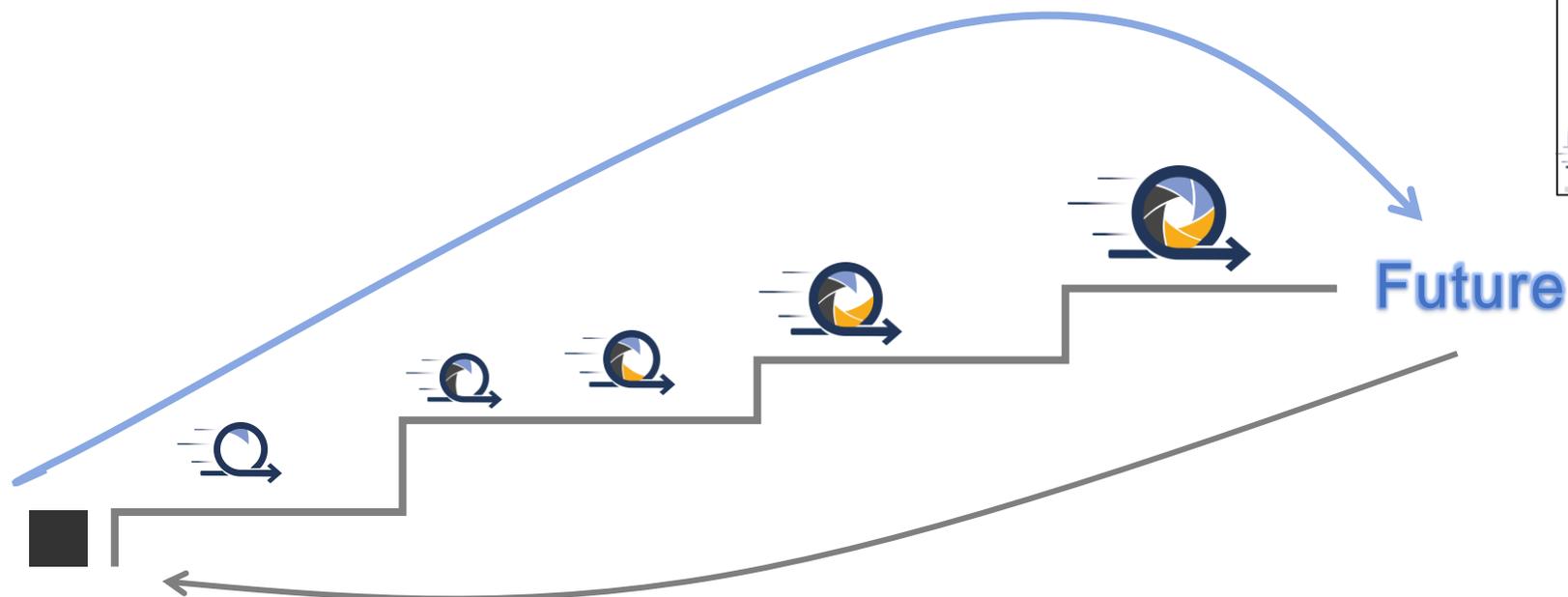
- As you create clarity, you can make larger investments, more confidently



**Dynamically find & solve
the right problems**

Optimizing your strategic role

Start at the beginning with the end in mind



- Work *with* it, not against it
- Identify experiments that will yield the next level of clarity
- “Don’t do nothing because you can’t do everything”



C.Patrick-Goudreau

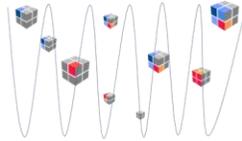
Strategic Thinking Models



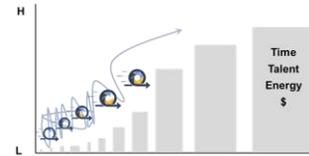
▲ Situating ✓



▲ Iterating ✓



▲ Calibrating ✓



Feedback Activity

What was valuable and meaningful for you today?

Great session. Strategy as an iterative process.	I like "you have the right to be strategic"	Appreciated the various dimensions shared	It my duty and right to be involved in strategic discussions	Very well-thought out presentation. Thank you.	Several tips and hints I can use in my own endeavours	Clear, beautiful slides
Great ideas in molding changes to strategy	Enjoyed the easy format	I especially appreciated hearing the iterative aspects	Mary "gets" us BAs	Using a practical lens for explanations	Understanding the different approaches and each phase of strategy thinking. It is great	Well-timed for board members coming off a fresh strategic planning session
Strategy becomes clear as we move closer to it	Hearing the different takes on strategy	To be strategic as a Ba we need to always that with the future in mind	The slides were great at tying the various methods together	Look up, look ahead, look across, look outside	Thank you for introducing new online tool	Introduction to Nureva
Interactivity is great when it works :)	Hearing that it's ok to push back on strategy to make things clear	Really liked the placement of us, the BAs, on a continuum from strategic to operational	Mind-expanding - I don't often work on projects where the strategy still "in play"	Seeing such an organized presentation of how to reach a strategic input	Well done. Solidified my own understanding of narrowing strategies to tactical stages	Strategy is iterative
Beautiful imagery really brought the message home	interactive experience made discussion more engaging	Complex subject but great presentation!	Tips on asking "what the hell" in a polite fashion	Thought it insightful to hear your views and our duty/right to be strategic	We have the right to ask questions!	The online tool is fantastic

Learning and Opportunities for Improvement

Opportunities for Improvement

Begin with examples of strategies - some successful, some not	Keep QR code up I lost connection twice
Talk about why Strategy is hard.	Share the URL in the chat
Liked video on and open mics	Just pause to ensure everyone is up and running with you
Add some tips at the end about what we can practice tomorrow	Perhaps do a practice of Nureva before hand
Possibly add a real world scenario	If nureva is working, maybe one or two more interactive questions / topics.
	Let people practice with Nureva ahead of time with an introduction of themselves



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