

CapTech[®]

Others Talk, We Listen.

 **IIBA**[®] DC Metro
Chapter

Strategizing Purpose or Profit

Strategy Analysis Primer through the Lens
of Non-Profit and For-Profit Organizations

Agenda

SWOT Analysis

Business Cases

Brainstorming

Market Analysis



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About CapTech

CapTech services...

LARGEST

U.S. Credit Union +
Independent U.S. Brokerage Firm



7TH LARGEST

Mutual Fund Company

2



of the 3 Largest
Full-Service US Retailers



TOP 5
Banks

IIBA DC Chapter

- Not-for-profit organization dedicated to the Business Analyst Community and Profession
- We hold monthly chapter meetings to connect with and learn from the local BA community
- We host BABOK® Study Groups to support the pursuit of IIBA credentials
- Upcoming events are posted here: iibadc.org

Thanks to our chapter sponsors!





| SWOT Analysis

Section One

| Others Talk,
We Listen.

Technique - SWOT Analysis

SWOT is an acronym for **Strengths**, **Weaknesses**, **Opportunities**, and **Threats**

STRENGTHS:

- Anything that the assessed group does well.
- May include experienced personnel, effective processes, IT systems, customer relationships, or any other internal factor that leads to success.

WEAKNESSES:

- Actions or functions that the assessed group does poorly or not at all.

OPPORTUNITIES:

- External factors of which the assessed group may be able to take advantage.
- May include new markets, new technology, changes in the competitive marketplace or other forces.

THREATS:

- External factors that can negatively affect the assessed group.
- May include factors such as the entrance into the market of a new competitor, economic downturns, or other forces.

Technique - SWOT Analysis

SWOT analysis can be used to:

- evaluate an organization's current environment internally and externally
- share information learned with stakeholders
- identify the best possible options to meet an organization's needs
- identify potential barriers to success and create action plans to overcome barriers
- adjust and redefine plans throughout a project as new needs arise
- identify areas of strength that will assist an organization in implementing strategic plans

Technique – SWOT Analysis

Usage Considerations:

Strengths	Limitations
Is a valuable tool to aid in understanding the organization, product, process, or stakeholders	The results of a SWOT analysis provide a high-level view; more detailed analysis is often needed.
Enables business analysts to direct the stakeholders' focus to the factors that are important to the business	Unless a clear context is defined for the SWOT analysis, the result may be unfocused and contain factors which are not relevant to the current situation

IIBA DC Oct / Nov 2014

October

2 Board Members
Held First Professional Develop Day (PDD)
Regular Monthly Meetings
Strong Partner Support
75 Chapter Members



November

5 Board Members
Want to Hold Second Successful PDD
Increase the Number of Programs
Increase Membership
Increase Partnerships
Reduce Member Costs
Educate Others about Business Analysis
Build General Excitement for BA
Create Win / Win Situations for All

Strengths



Collaboration



Community



Partnerships

Weaknesses



Threats



Project



Institute



TECHNIQUE PRACTICE EXERCISE

Group Exercise - SWOT ANALYSIS

1. Break into groups
2. Choose a well known company: Chipotle, Dunkin Donuts, Walmart, Amazon, Starbucks, Uber, Target, Zappos, Netflix)
3. Assess the company's Strengths, Weaknesses, Opportunities and Threats
4. Come up with a recommendation on a strategic change based on the SWOT results.



SWOT Analysis Exercise

Strengths:

- In what ways does the company excel?
- How strong is their market position?
- Is there a clear strategic direction?
- What makes their customers happy?
- What does the company do really well?
- What gives them competitive advantage?

Weaknesses:

- What does the company do poorly?
- What is disappointing to their customers?
- How current is the company's technology?
- Is there a clear customer relationship management program in place?

Threats:

- What are the company's competitors doing?
- What obstacles is the company facing?
- Are increased costs causing difficulties?
- Is pricing weak?
- Is changing technology threatening their position in the market?
- Is the legal environment changing?
- Is the economic environment changing?

Opportunities:

- What favorable situations exist for the company in the marketplace?
- What can be done to attract additional customers and markets?
- What trends can be leveraged for expansion?
- What advancements can be made in technology?

Opportunities

 Promontory
Interfinancial NetworkSM



THE WORLD BANK





| Business Case

Section Two

| Others Talk,
We Listen.

Business Cases

- Provides justification for a course of action based on the benefits realized by using the proposed solution
- Captures the rationale for undertaking a change
- Used to:
 - Define the need
 - Determine the desired outcomes
 - Assess constraints, assumptions, and risks
 - Recommend a solution

Usage Considerations:

Strengths	Limitations
Provides an amalgamation of the complex facts, issues, and analysis required to make decisions regarding change	May be subject to the biases of authors
Provides a detailed financial analysis of cost and benefits	Frequently not updated once funding for the initiative is secured
Provides guidance for ongoing decision making throughout the initiative .	Contains assumptions regarding costs and benefits that may prove invalid upon further investigation

Mobile Use Growth

Number of Global Users (Millions)



Is your company currently considering mobile use?

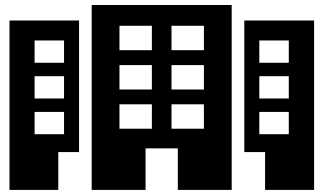


Desktop

Mobile

Source: Morgan Stanley Research

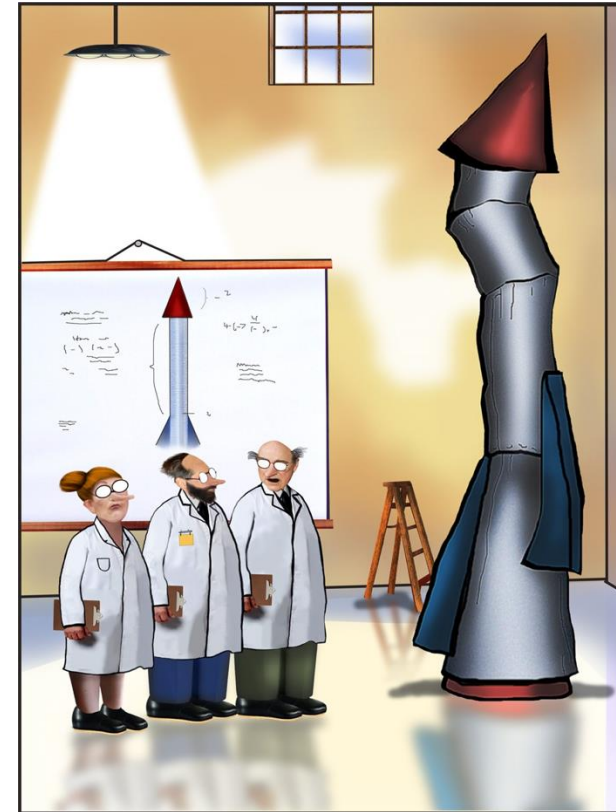
The Role of the Phone



New Tools & Techniques

An extension of what you already know and do every day.

- Not rocket surgery
- Analysis process remains intact
- Additional considerations for mobile
- More technical considerations
- Now a 'must-have' skill



“It’s time we face reality, my friends. ...

Ward **We’re not exactly rocket scientists.”**

Mobile Development Landscape

Why are Mobile efforts different from other development efforts?

The user experience component is critical

- Feedback is immediate and public
- Conducting usability studies is recommended
- App users expect regular updates. Quarterly is ideal.
- Performance is part of the experience

Considerations for Delivery Team

- Most apps are for external facing customers but can also be used for internal customers. Example: Lowe's
- Marketing & Engagement through the app
- Technology and hardware varies and changes often
- Often same functionality needs to be delivered across multiple platforms.
- Prototyping and demos are very important

Considerations for Developers and UX Designers

- Native versus Mobile web, Device memory, OS versions to be supported, security, connectivity, OS standards, camera, screen size, etc..

Plan into Practice

Jack Cox

Managing Director, CapTech Consulting



Jack Cox is a software developer, systems architect, and Managing Director at CapTech Consulting, Inc. where he is responsible for the firm's mobile software practice. Recently he's been working with Fortune 500 companies to develop innovative mobile apps for customers and employees. Jack is a frequent speaker at professional conferences where he opines on all things mobile. He has been involved in several startups, numerous Fortune 500 companies, wrote a book on iOS development, and holds multiple patents. Jack has a degree in computer science with a minor in systems analysis from Taylor University in Upland Indiana. He currently lives in Richmond, VA with his wife and kids.

Jack's 2016 Presentations:

1. **Everything Is Mobile In The Age Of The Consumer**

Friday, November 4, 2016 (11:30 am - 12:30 pm)

Paul Wren

Manager, CapTech Consulting



Paul Wren is a Manager at CapTech Consulting, serving in Business Analysis and Project Management roles for clients in the greater Philadelphia area. Paul has an extensive background in content and process management, leveraging solution capabilities to meet client business needs across a wide range of industries including Financial Services, Telecommunications and Life Sciences. Paul has a degree in Psychology from the University of Pittsburgh and lives in Wayne, Pennsylvania with his wife and children.

Analysis & Planning

- Business Drivers
- Journey Mapping

Scope & Requirements

- Platform vs Functional Analysis
- Defining Target Users
- Product Definition
- Non-Functional Requirements

Model Solution

- Human Interface Guidelines
- Presentation Modes
- Interaction Modes

- Location Awareness
- Animation
- Gestures
- OS/App Interaction
- Network Scenarios
- Failure Modes
- Resource Utilization

Development

- Environment

Testing & Operation

- Functional Testing
- Performance Monitoring & Analytics
- Field Testing
- Testing Tools



| Brainstorming

Section Three

| Others Talk,
We Listen.

Technique – Brainstorming

Brainstorming:

- Produces a broad and diverse set of new ideas derived from themes for further analysis
- Focuses on a topic or problem and attempts to answer specific questions related to that topic
- Best applied in a group setting as it pulls from experiences and creativity of group members





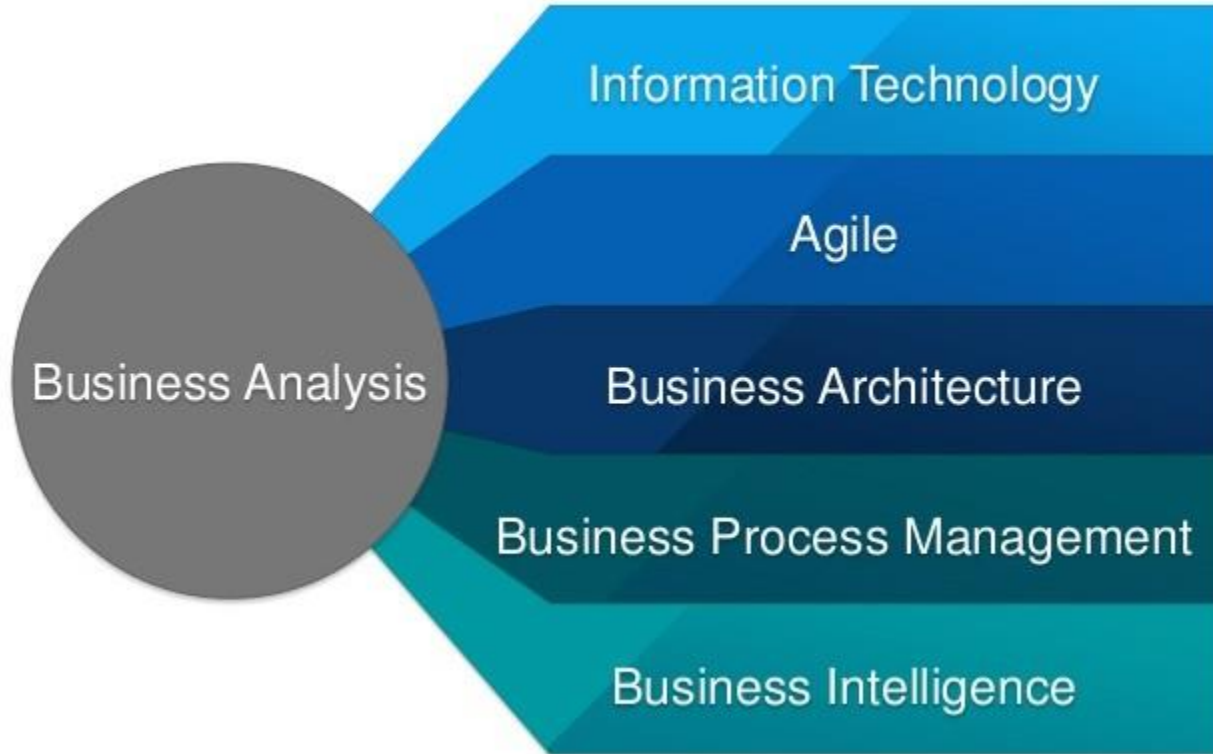
TECHNIQUE PRACTICE EXERCISE

Group Exercise - BRAINSTORMING

1. Break out into teams
2. Select one person to play the role of Scribe
3. Topic: New Car Assembly
4. Teams brainstorm requirements for the new car



BABOK Perspectives



Brainstorming Can Happen Anywhere



Direct Result

Fall series: Analysis Outside of the IT box

Start	07 Sep 2016	Introducing our Fall Series: Analysis Outside of the IT box.
End	07 Dec 2016	Feeling in a rut? Want new ideas and innovative conversation?
Schedule	4 sessions	This fall, we will explore how analysis expertise is employed in professions outside of the information technology field.
#1.	07 Sep 2016, 6:00 PM – 8:00 PM	Register here to attend all 4 sessions in the series. Check back for detailed information for each individual session.
#2.	27 Sep 2016, 6:00 PM – 8:00 PM	
#3.	02 Nov 2016, 6:00 PM – 8:00 PM	Sessions September 7 - "Building a Performance Improvement Culture" with Kim Christman of Bureau of Consular Affairs, U.S. Department of State
#4.	07 Dec 2016, 6:00 PM – 8:00 PM	September 27 - "We are solving a problem, not building an app!" with Angela Wick of BA-Squared
Location	Sponsor locations	November 2 - "Capturing Culture with NitroColdBrew" with Chase Damiano of Commonwealth Joe
Registered	19 registrants	December 7 - "Applying Design to Improve Workplace Collaboration" with Ashley Marshall of Hickok Cole Architects

IIBA DC Nov 2014 to Sep 2016

November

- 5 Board Members
- Want to Hold Second Successful PDD
- Increase the Number of Programs
- Increase Membership
- Increase Partnerships
- Reduce Member Costs
- Educate Others about Business Analysis
- Build General Excitement for BA
- Create Win / Win Situations for All



September

- 7 Board Members
- Held Second Professional Develop Day (PDD)
- Dual Event Series Held each month
- First Ever DC Chapter Study Group
- 164 Chapter Members
- 10 Partners
- Local IIBA International Members now join FREE
- Spoke for PMI, INCOSE, and Federal Government



| Market Analysis

Section Four

| Others Talk,
We Listen.

Market Analysis

- Involves researching customers in order to determine the products and services they need or want
- Research supports the various decision-making processes when considering change

Usage Considerations:

Strengths	Limitations
Provides information about new and different methods, ideas, and tools for improvement	Organizations may not have the expertise to interpret useful information.
Company comparisons can be leveraged to gain competitive advantage	Does not produce innovative solutions or solutions that will produce a competitive advantage
Identifies why similar organizations are successful	Can be time-consuming and expensive
Targets specific groups and can be tailored to answer specific questions	Without market segmentation, market analysis may not produce accurate data about a competitor's products/services.
Exposes weaknesses within an organization or industry.	

Mobile Growth Drivers

- Consumers want real-time access to everything
- Companies have multiple consumers. Internal and External.
- Market is pursuing consumer and employee based apps to target smartphone/ tablet / mobile users
- Increased revenue is not necessarily the driving force, sometimes is cost savings or Customer perception and market leadership
- Having a unified digital strategy now a large consideration
 - Consumers usually have multiple devices and they expect a similar experience across all of them.

Mobile Growth Drivers

Ubiquitous Connectivity

Incredible Smartphones

Vibrant App Ecosystems

Allows devs to be creative
and think outside the box

Technology and
possibilities are
constantly changing



Three Primary Ecosystems



Walled Garden



- Every app is certified before released

Common Green



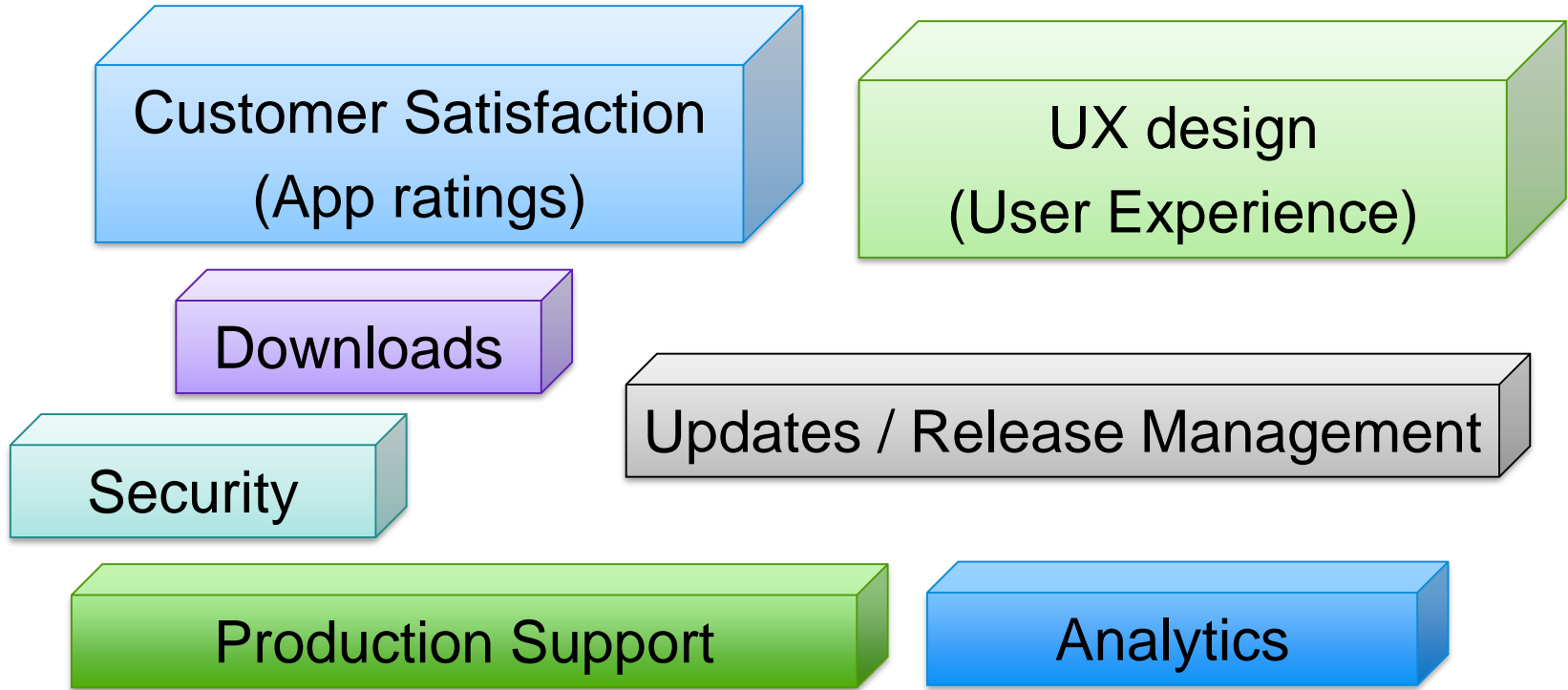
- Less secure since more common space
- "If nobody pays, everyone depletes"
- Controlled access but open to anyone
- Easier to release new versions
- Apps can be removed from store



Open App Ecosystems

- No boundaries
- Nobody gets kicked out

Mobile Environment Implications



What is mobile?...It depends



Mobile Offering Overview

We listen to clients' unique needs. Combined with market and mobile knowledge we provide services across the entire lifecycle that fit specific situations



Full Lifecycle Development

Complete mobile application & support



Mobile Assessment

Slow updates, unsatisfied stakeholders



Rescue & Remediation

Current application not meeting needs



Strategy

Help plan and provide direction



Insourcing Support

Transition to in-house development



Mobile Innovation Lab

Quickly try new idea or technology