Understanding Business Processes

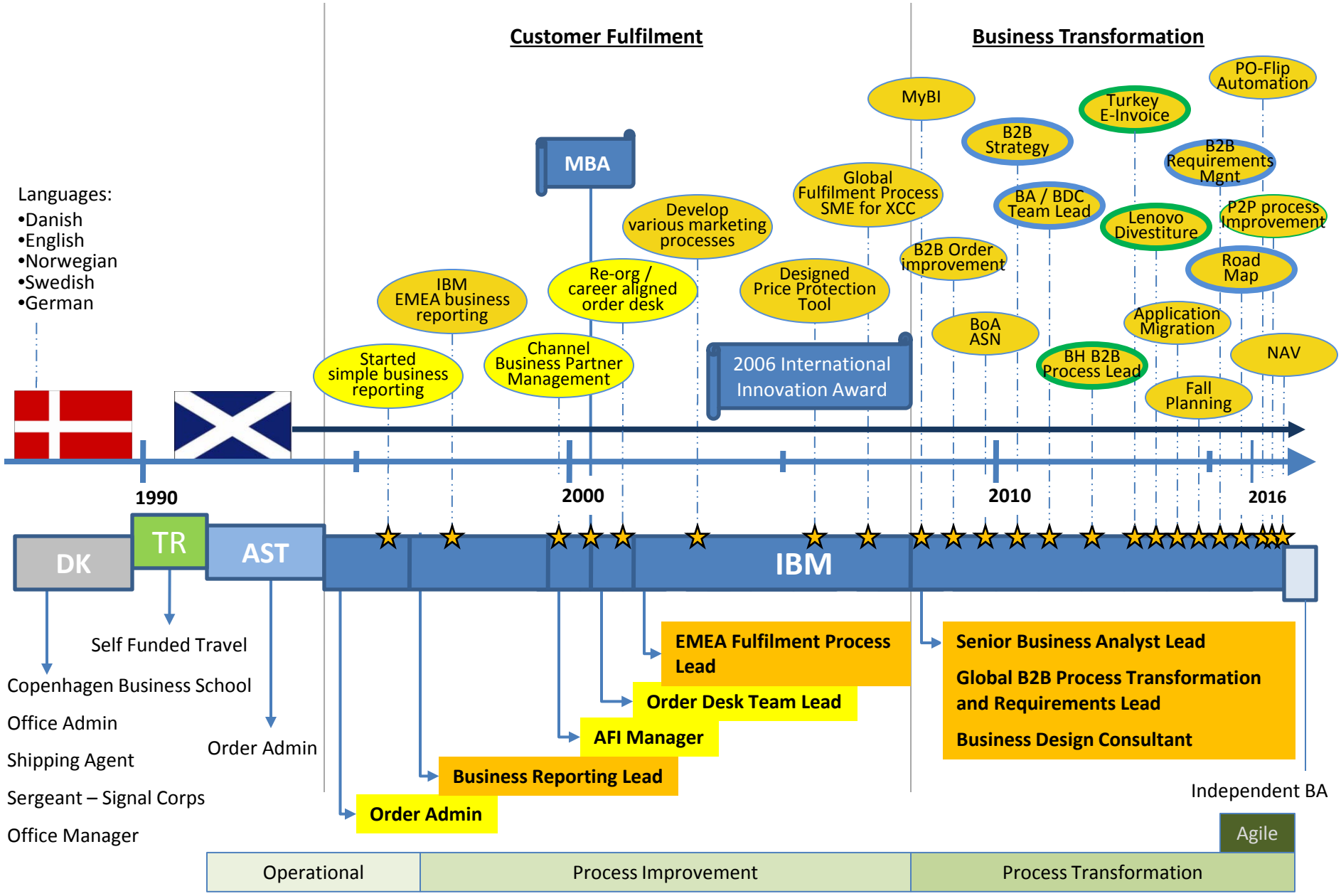
The benefit of using Visuals for Business Analysis

bjorn@hanghoj.com

Content

- My Background
- BA Role
- BA Role / IM Role
- Understand overall requirement
- Identify the stakeholders
- Understand the process
- Understand issues or need for change
- Key learning points

Bjorn's background



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BA Role

"A business analyst is any person who performs business analysis tasks, no matter their job title or organizational role." IIBA

Business Analysis tasks

1. Understand overall requirement
2. Identify the Stakeholders
3. Understand the process
4. Understand issues or need for change
5. Understand how to change
6. Document the change requirements
7. Support development of the changes
8. Support implementation of change

BA Role vs/ IM Role

"A business analyst is any person who performs business analysis tasks, no matter their job title or organizational role." IIBA

Business Analyst

1. Understand overall requirement
2. Identify the Stakeholders
3. Understand the process
4. Understand issues or need for change
5. Understand how to change
6. Document the change requirements
7. Support development of the changes
8. Support implementation of change

Information Manager

1. Understand Overall requirement
2. Identify Stakeholders
3. Understand the process
4. Understand information risks
5. Understand how to mitigate the risk
6. Document the mitigation recommendation report

BA Role vs/ IM Role

For case study – Focus on these 4 Tasks

Business Analyst	Information Manager
1. Understand overall requirement	1. Understand Overall requirement
2. Identify the Stakeholders	2. Identify Stakeholders
3. Understand the process	3. Understand the process
4. Understand issues or need for change	4. Understand information risks / need for change
5. Understand how to change	5. Understand how to mitigate the risk
6. Document the change requirements	6. Document the mitigation recommendation report
7. Support development of the changes	
8. Support implementation of change	

Case study: “PO-Flip e-Invoicing”

1. Understand overall requirement
2. Identify the Stakeholders
3. Understand the process
4. Understand issues or need for change

bjorn@hanghoj.com

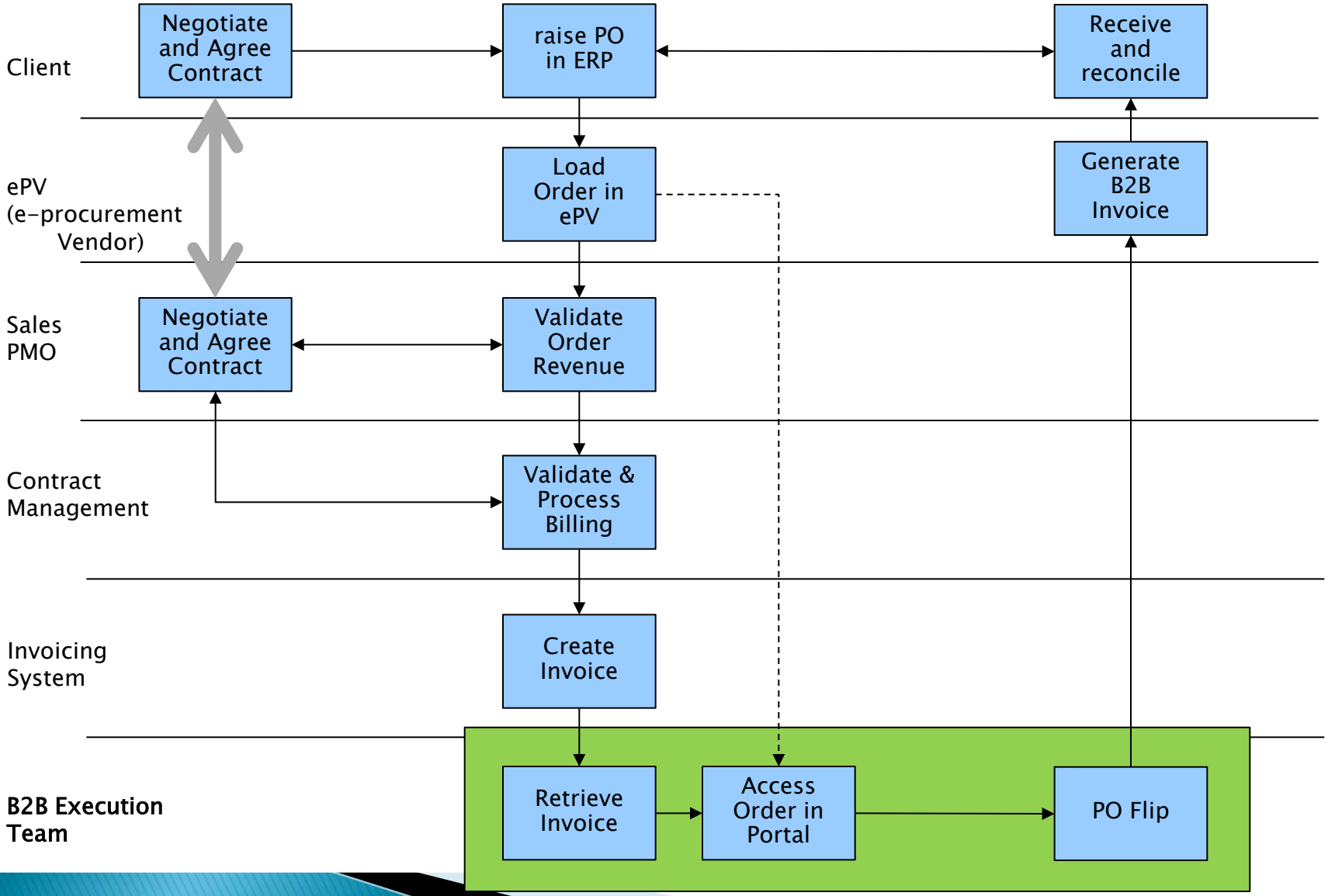
Understand overall requirement

- Work with Request Owner to understand the Project Requirements.
- Draw high level Process Flow to verify my understanding
- Document Problem statement, Scope and Objective etc.

Understand overall requirement

High Level Process Flow

E2e Procurement and Invoice process



Case study: “PO-Flip e-Invoicing”

1. Understand overall requirement
2. **Identify the Stakeholders**
3. Understand the process
4. Understand issues or need for change

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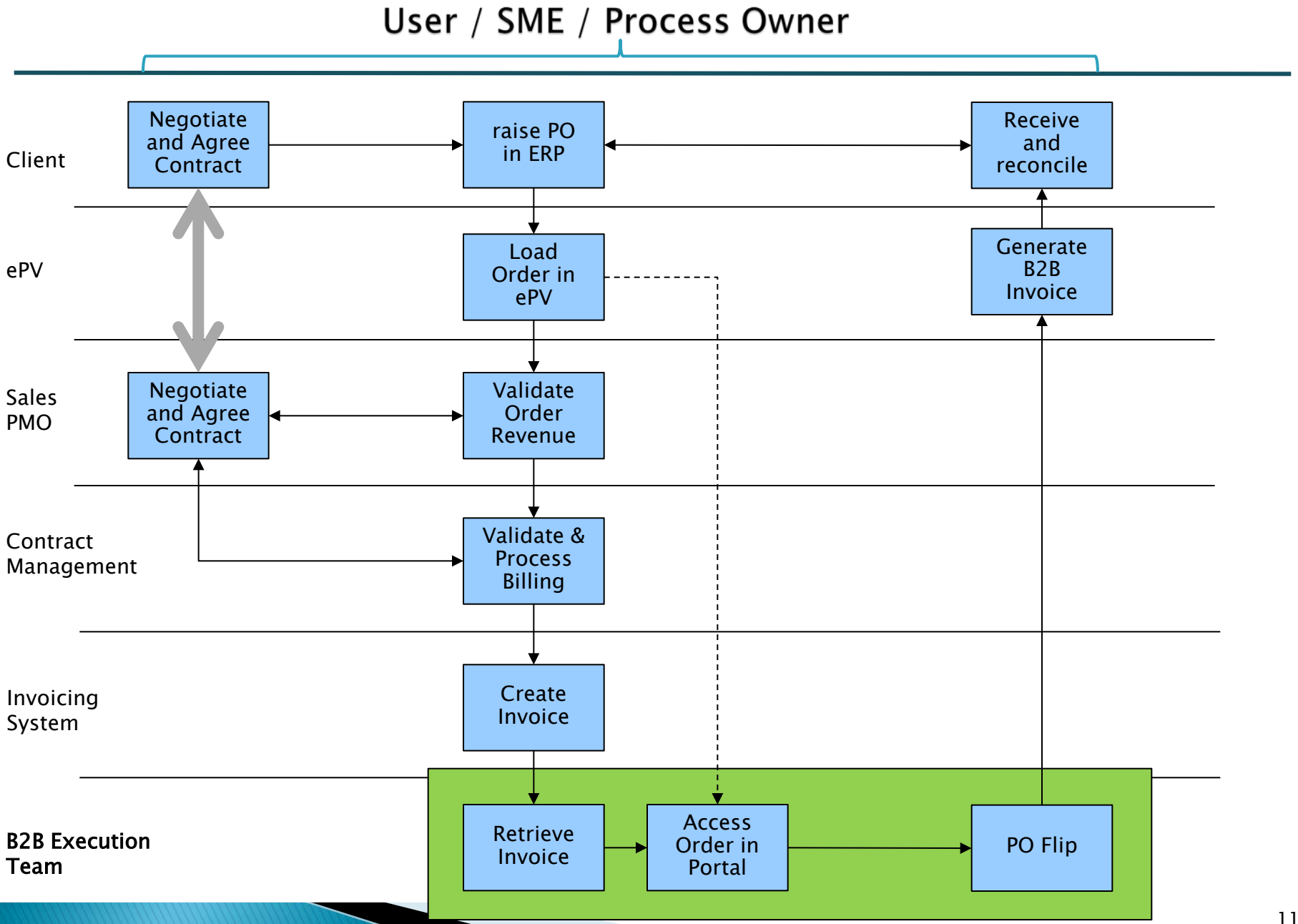
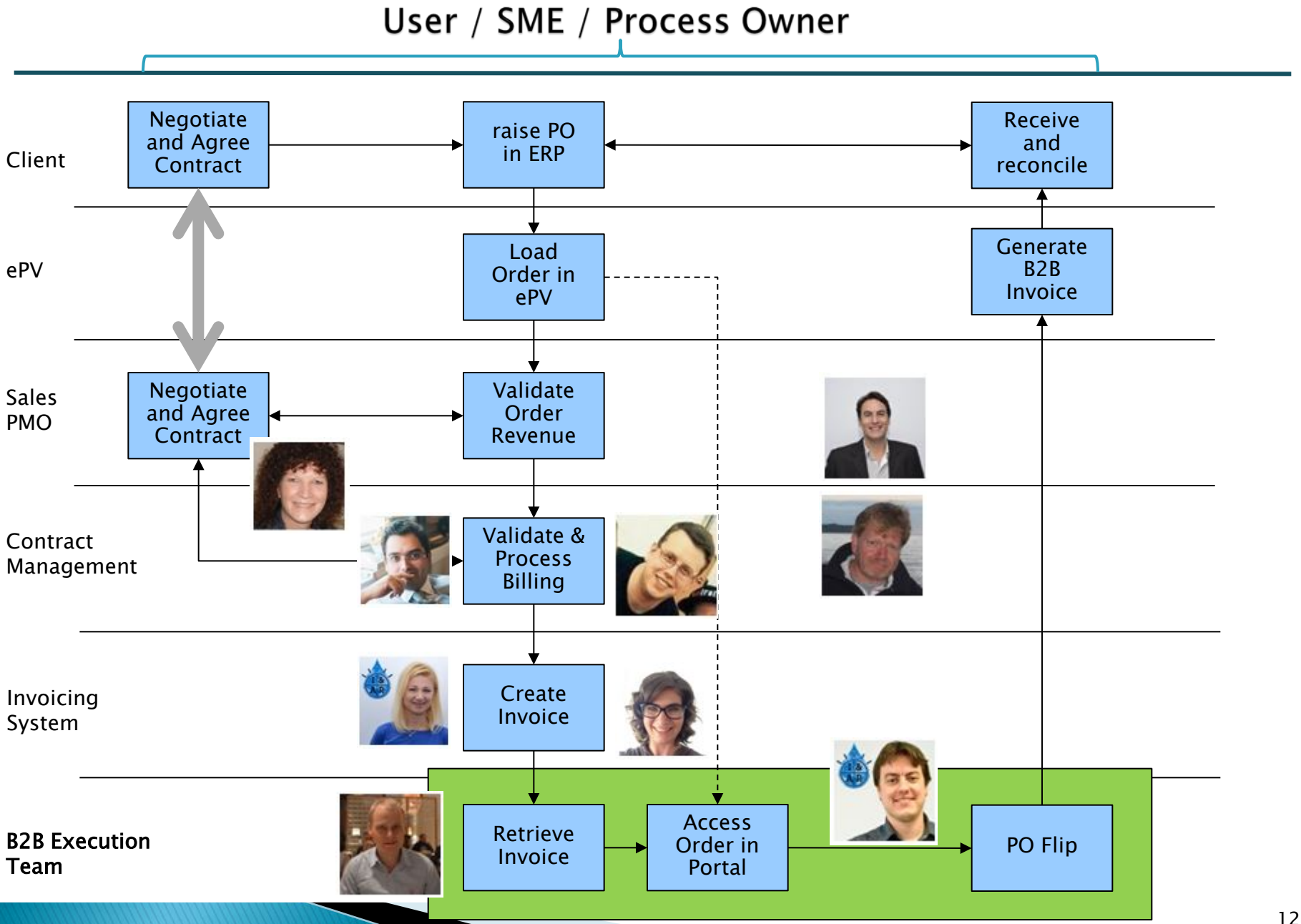
Identify the Stakeholders

Use as-is process flow



Identify the Stakeholders

Use as-is process flow



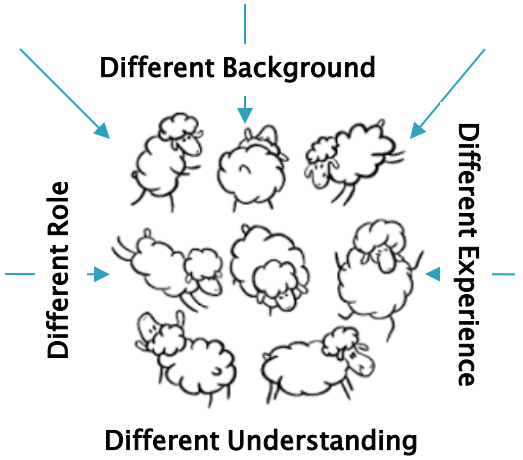
Case study: “PO-Flip e-Invoicing”

1. Understand overall requirement
2. Identify the Stakeholders
3. **Understand the process**
4. Understand issues or need for change

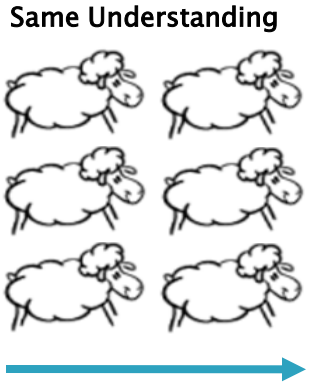
Understand the process

Align stakeholder understanding

- Stakeholders from different background, different roles and different experience don't see things the same way

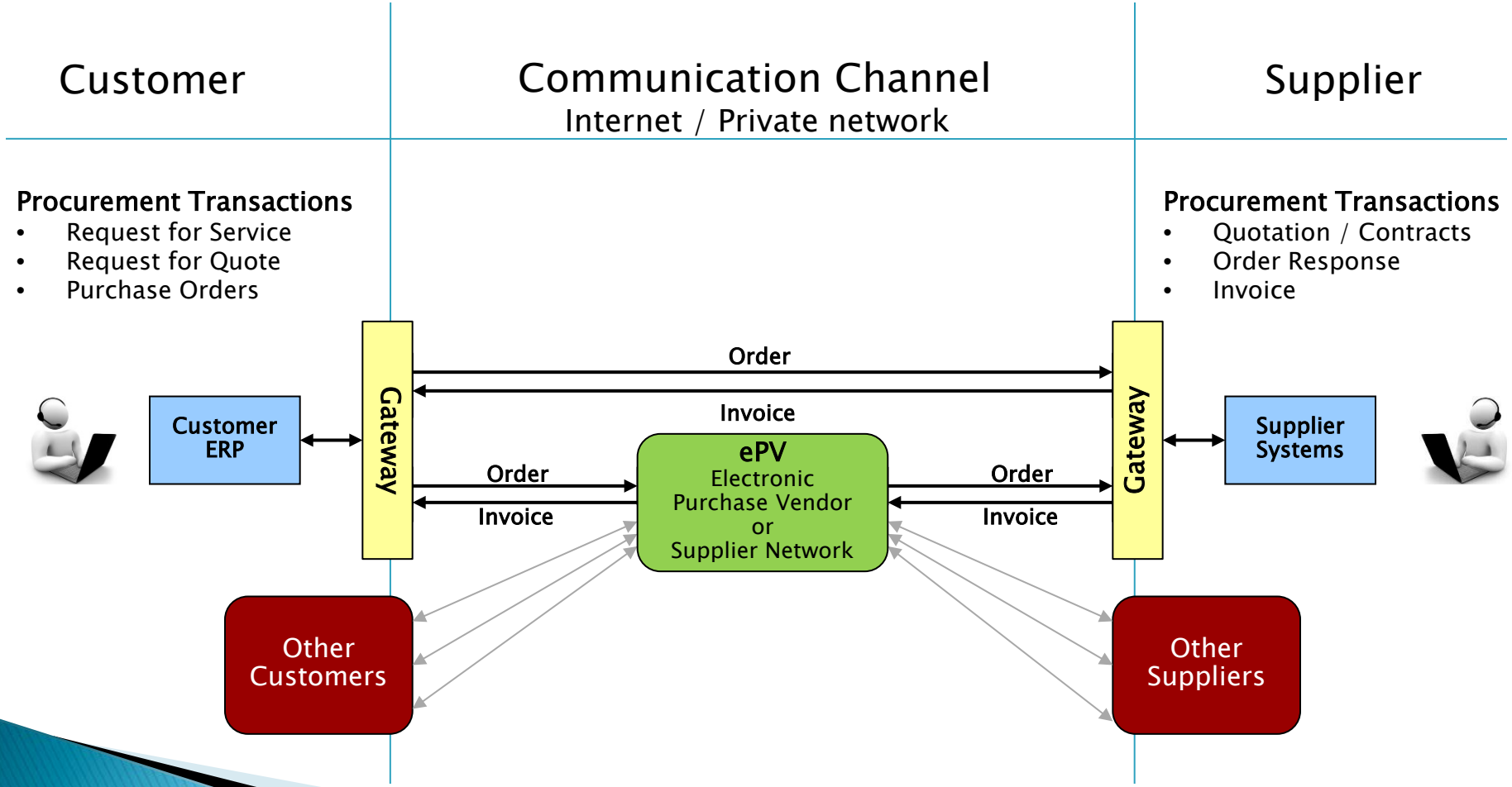


- Draw High level Graphic Representation of the overall Business Function



- Align Stakeholder Understanding

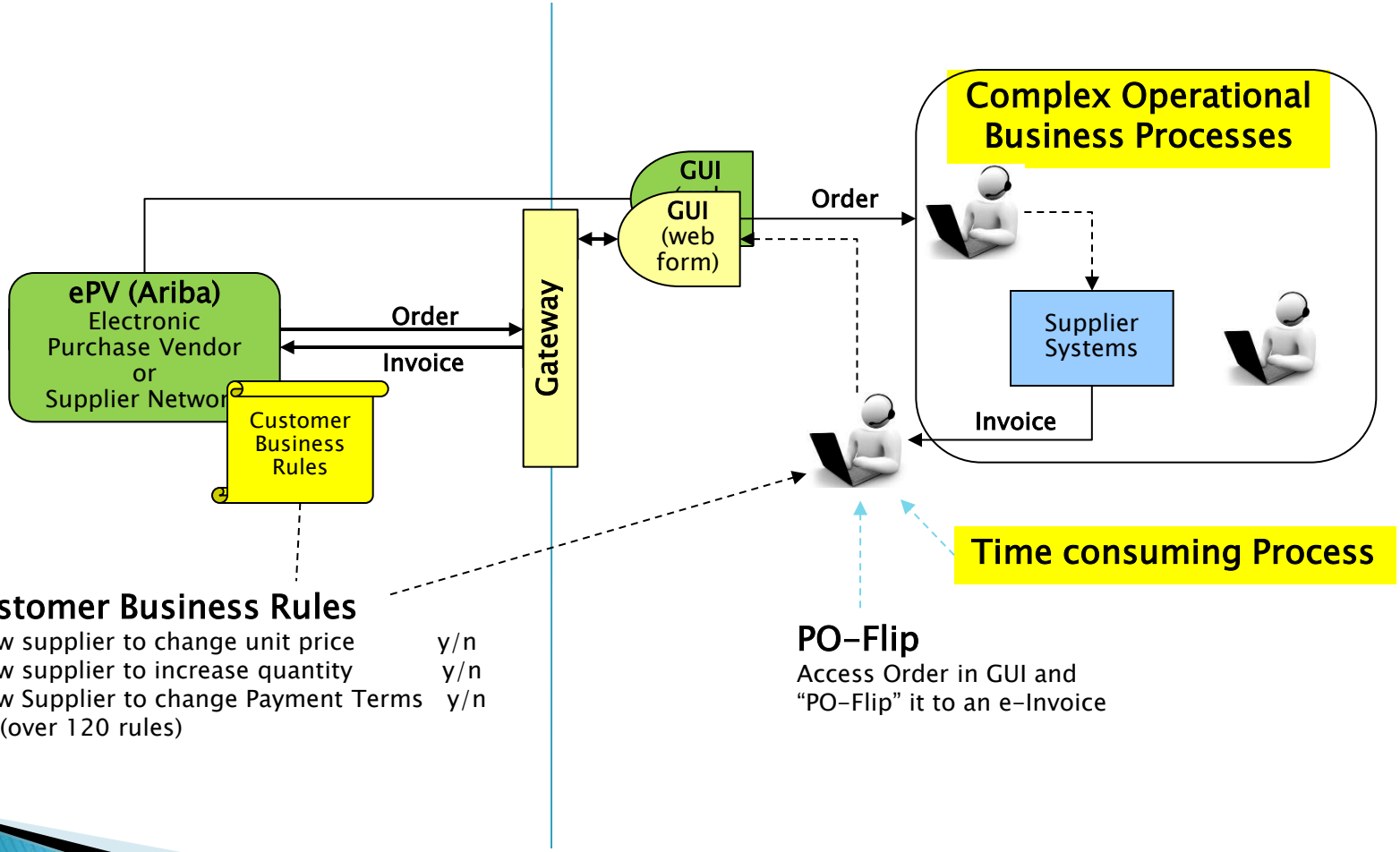
What do we mean by B2B?



Understand the process

Align stakeholder understanding

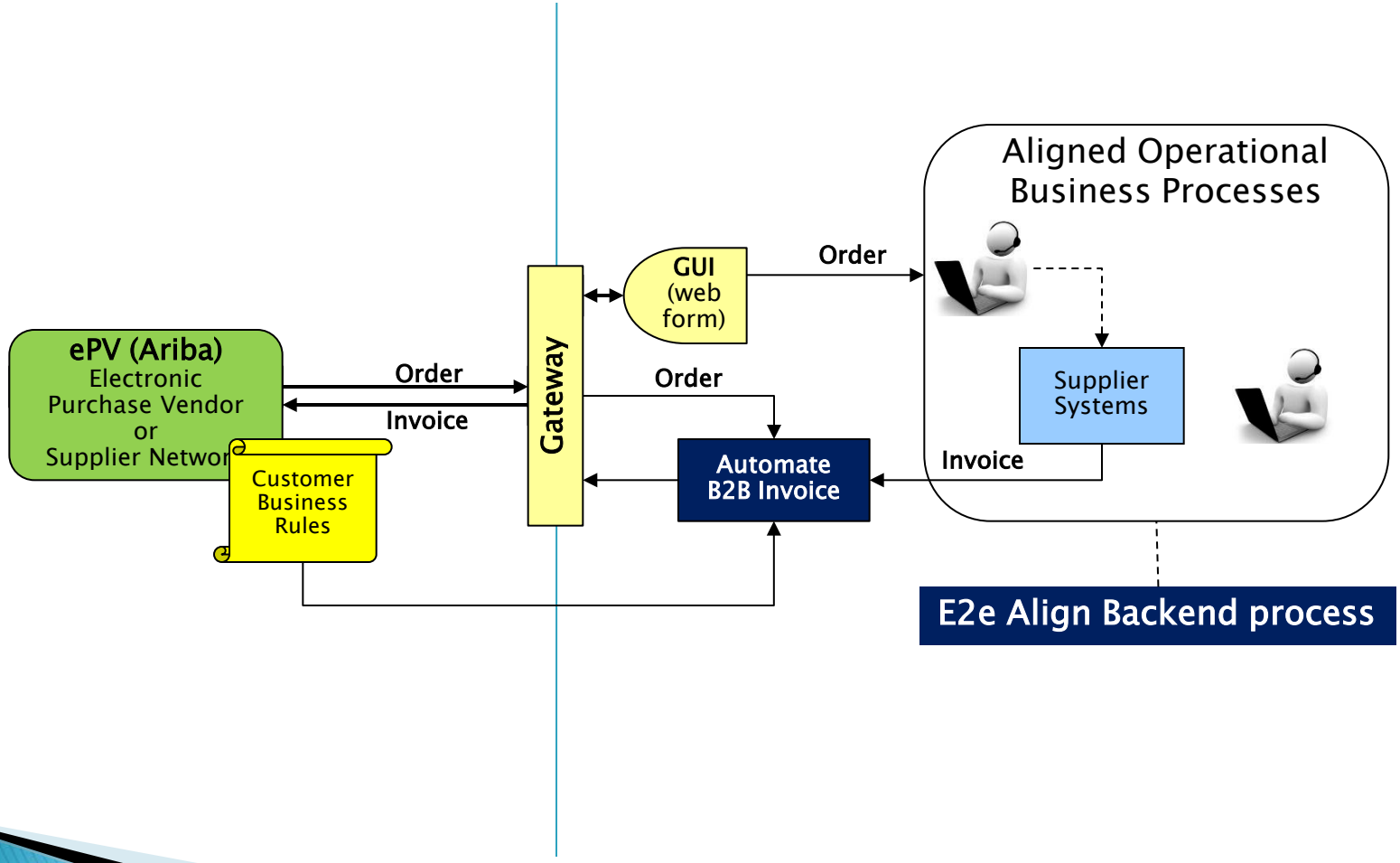
Current B2B Setup (PO-Flip)



Understand the process

Align stakeholder understanding

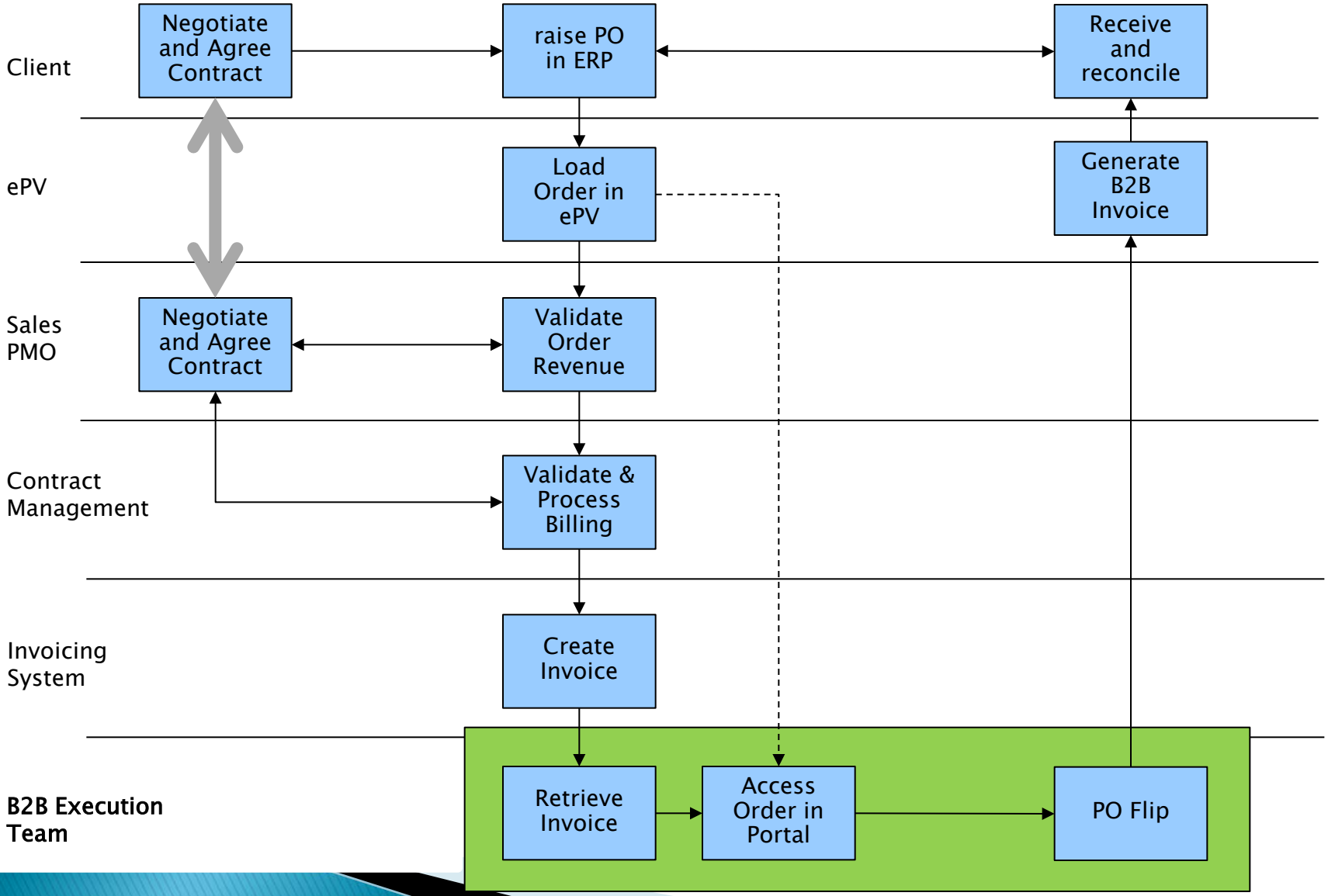
B2B Invoice ultimate Objective



Understand the process

Review, update and agree process

E2e Procurement and Invoice process



Understand the process

Problem Statement

- PO-Flip Invoicing is highly manual and time-consuming
- Many invoices faces various issues
- Issues identified so far includes:

Issues

- Payment Term Mismatch:
  - Payment Term on system invoice does not match Payment term on the ePV order
- Partial Billing of qty 1:
  - Service orders with qty 1 can only be partially billed via fraction quantities
- PO and Invoice line mismatch:
  - Invoice lines of system invoice can not be matched to the order lines
- Missing PO
  - PO referenced on system invoice can not be found in ePV
- Error PO:
  - PO in ePV has some form of error which can not be PO Flipped
- Non Contract T&C's on Order
  - The order is submitted with T&C's not recognized on the contract
- Attachment location issue
  - Attachments are stored in various different places based on country and LOB

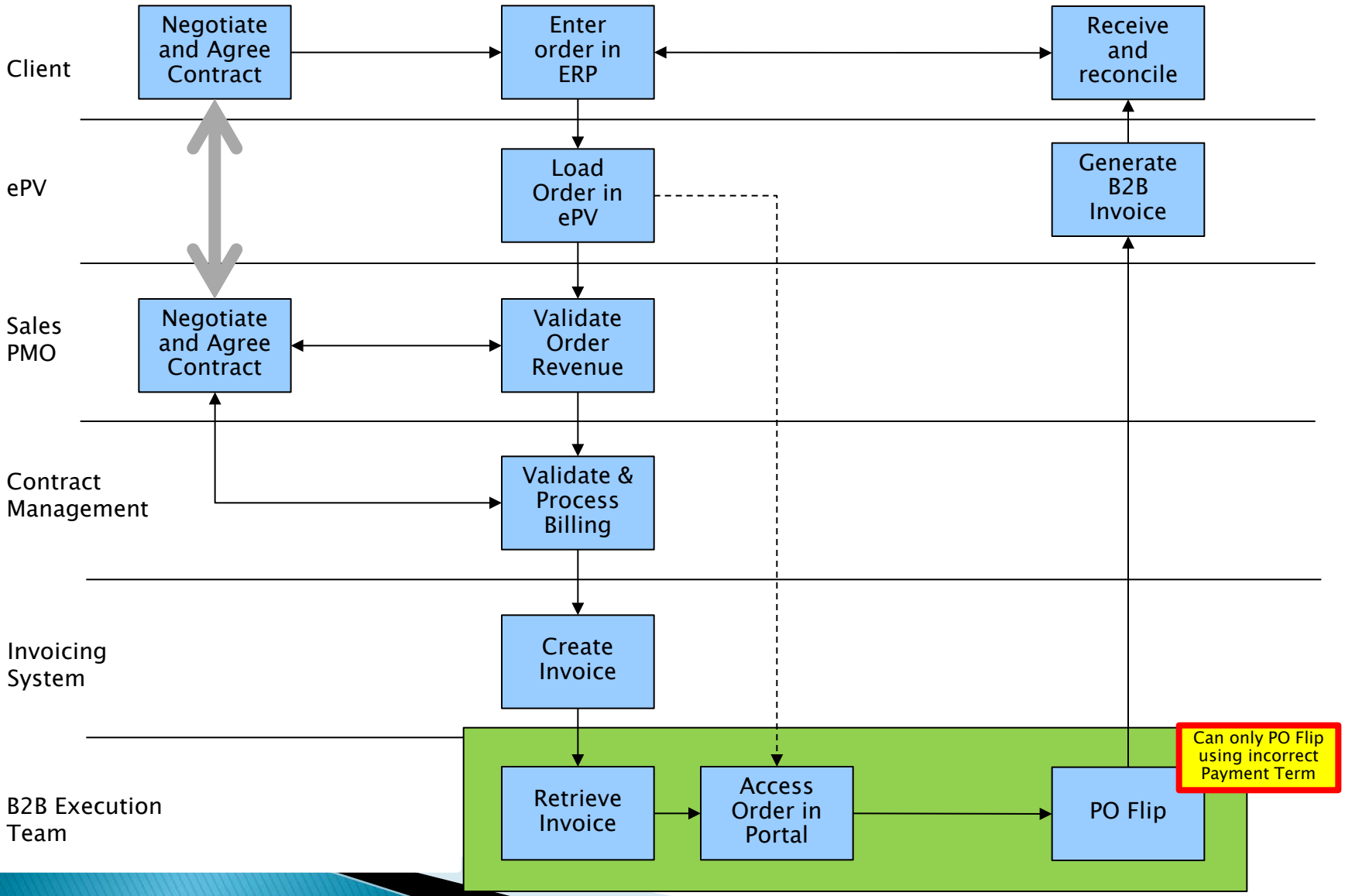
Case study: “PO-Flip e-Invoicing”

1. Understand overall requirement
2. Identify the Stakeholders
3. Understand the process
4. **Understand issues or need for change**

Understand issues or need for change

Payment Term Mismatch

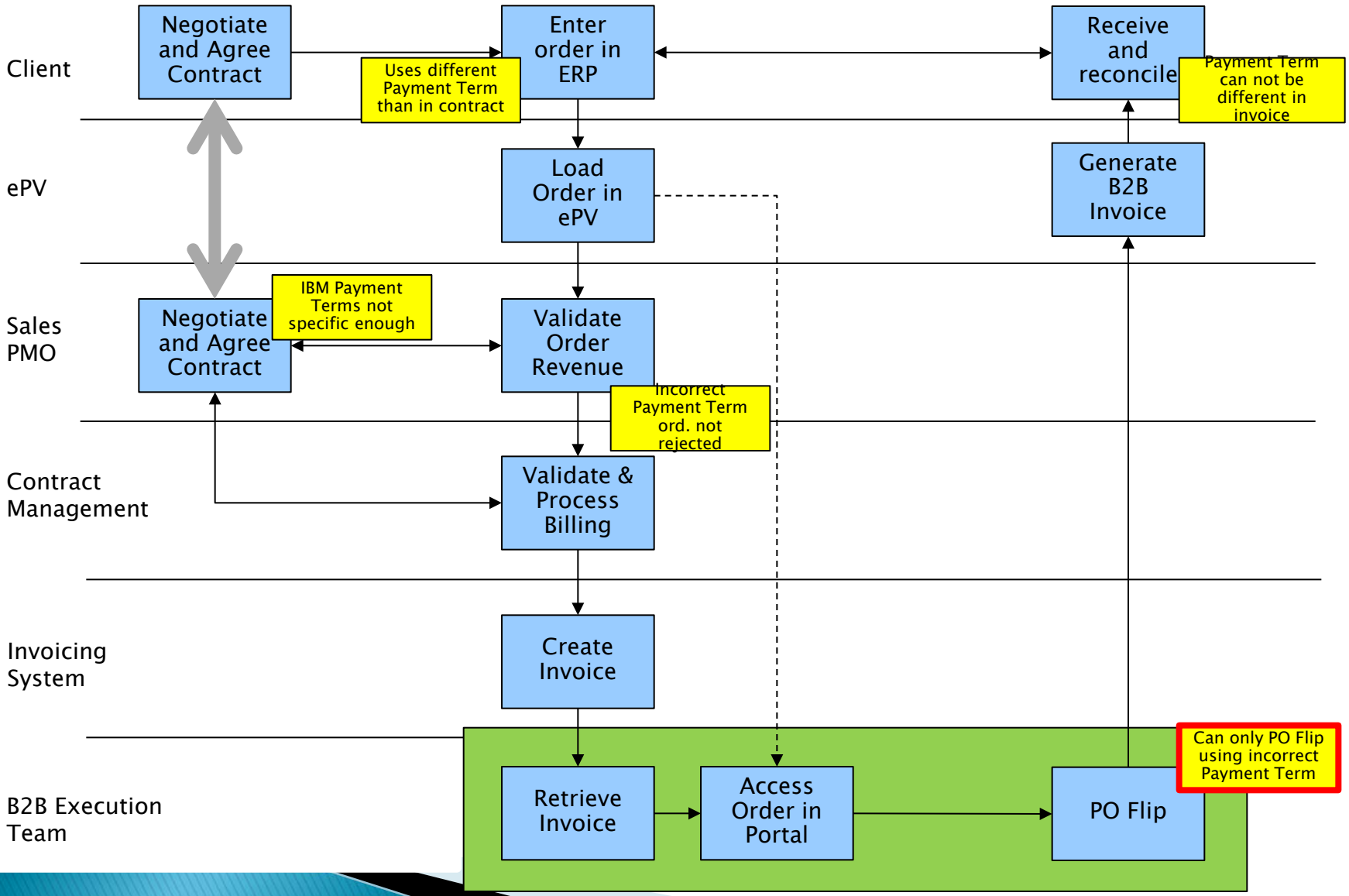
Issue impacting process



Understand issues or need for change

Payment Term Mismatch

Identify root cause



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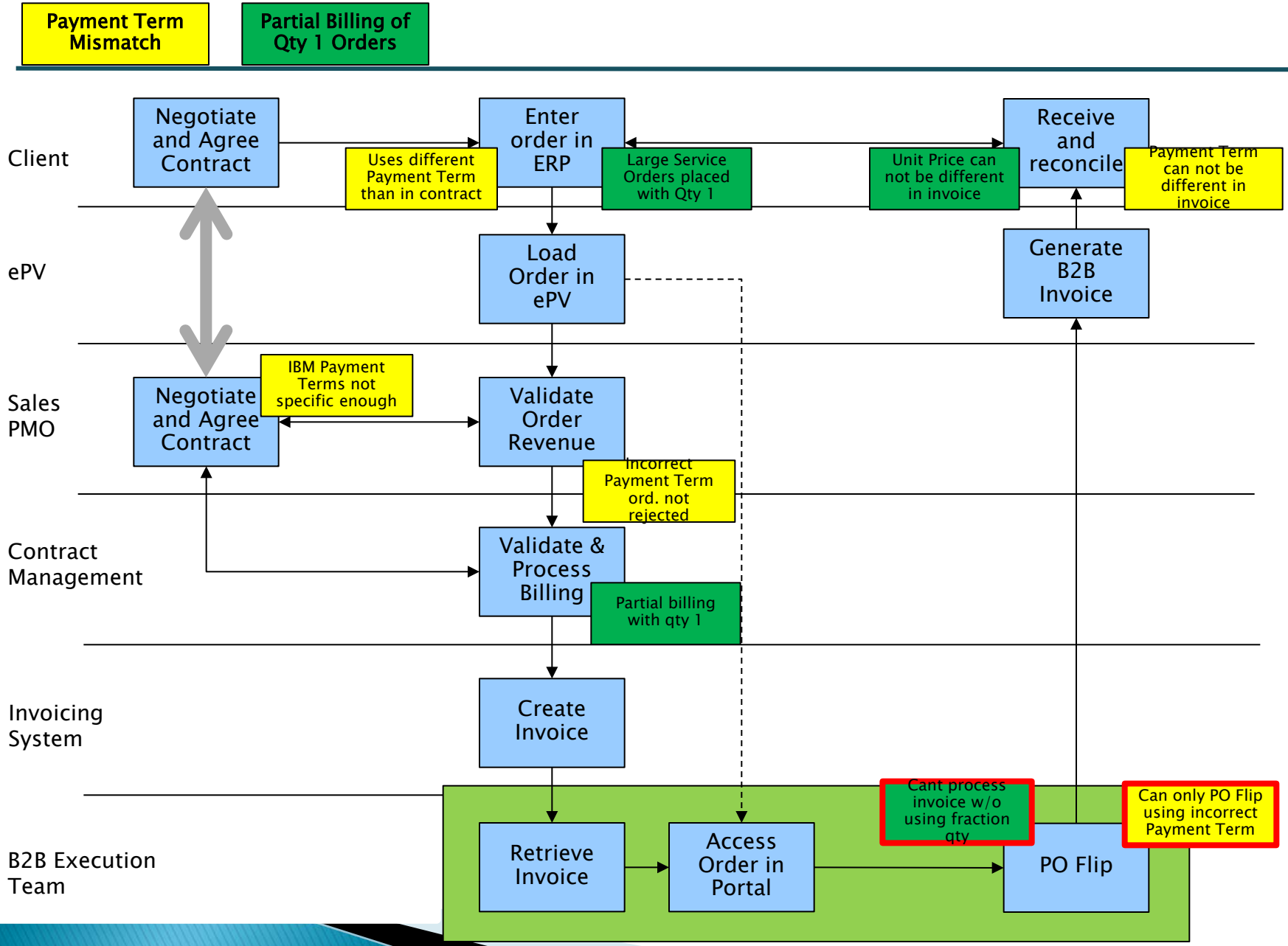

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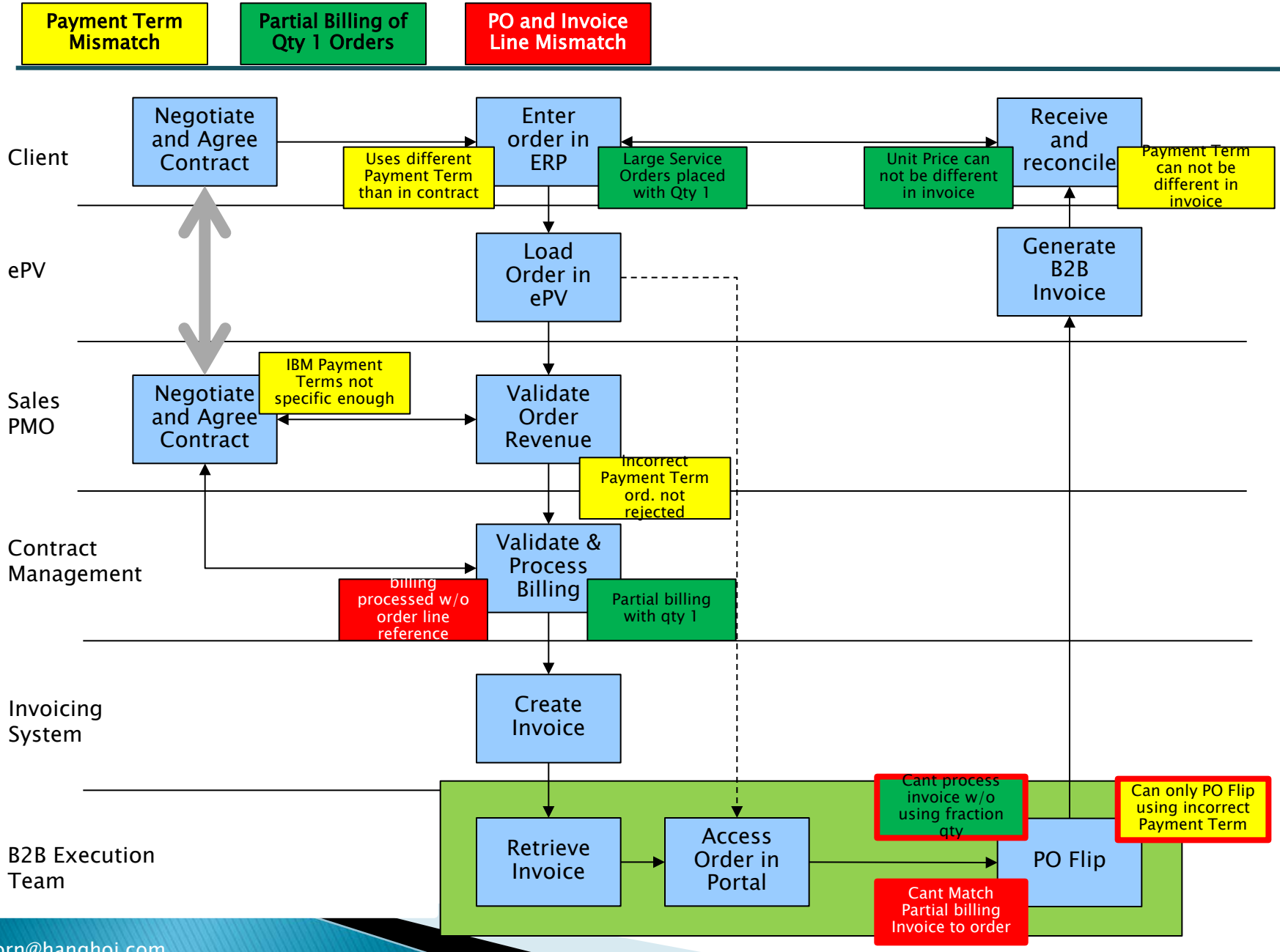

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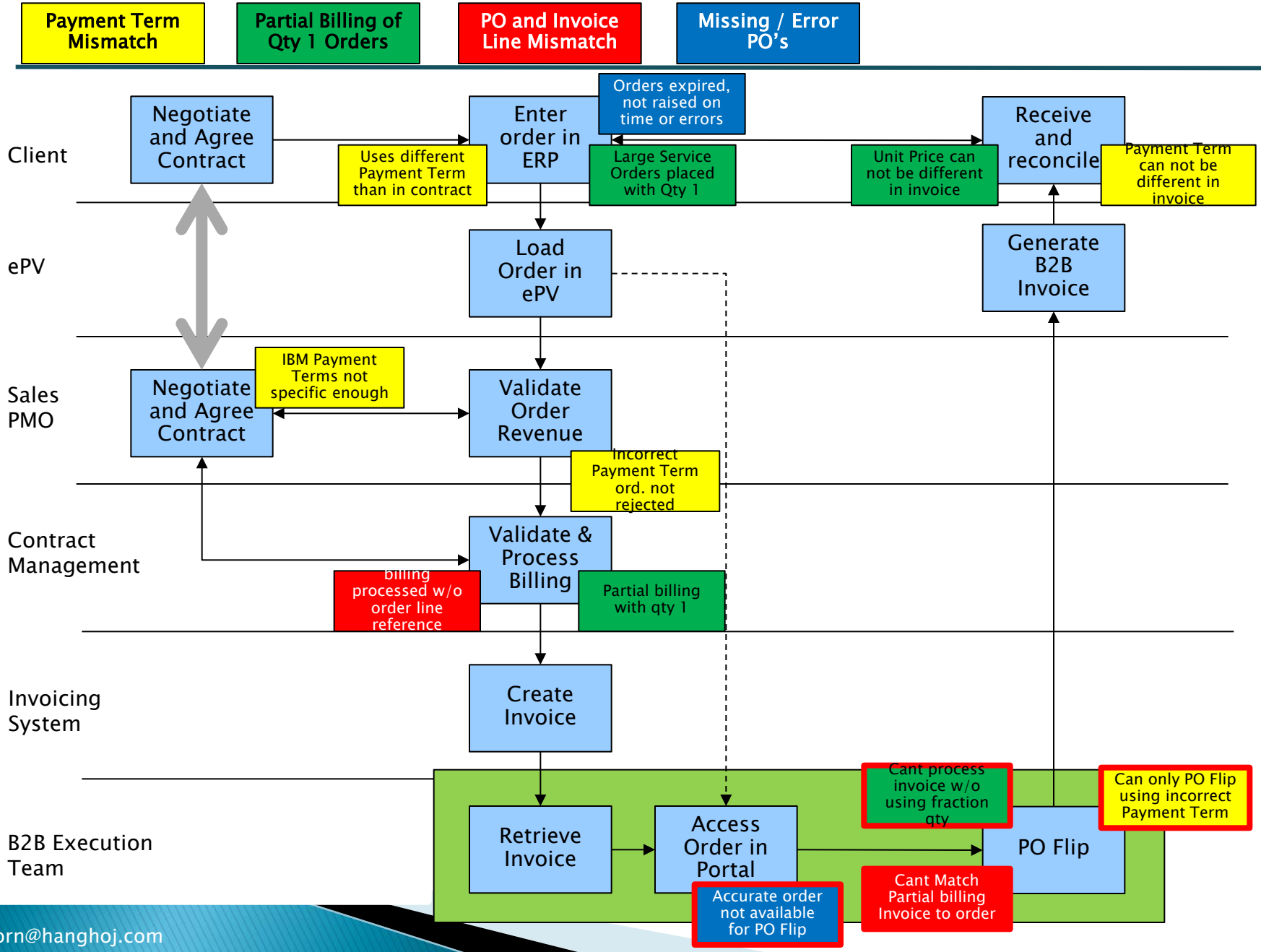

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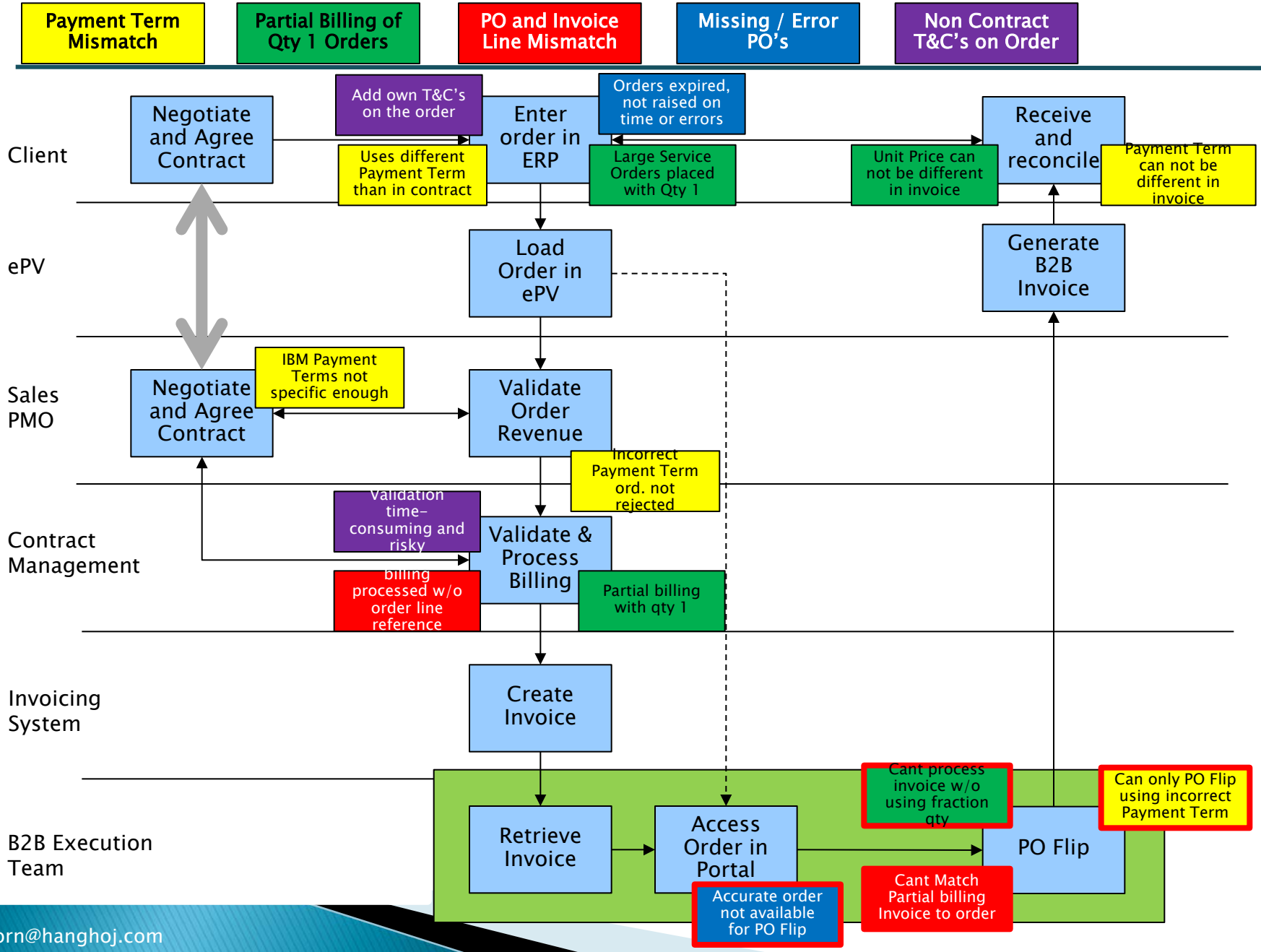

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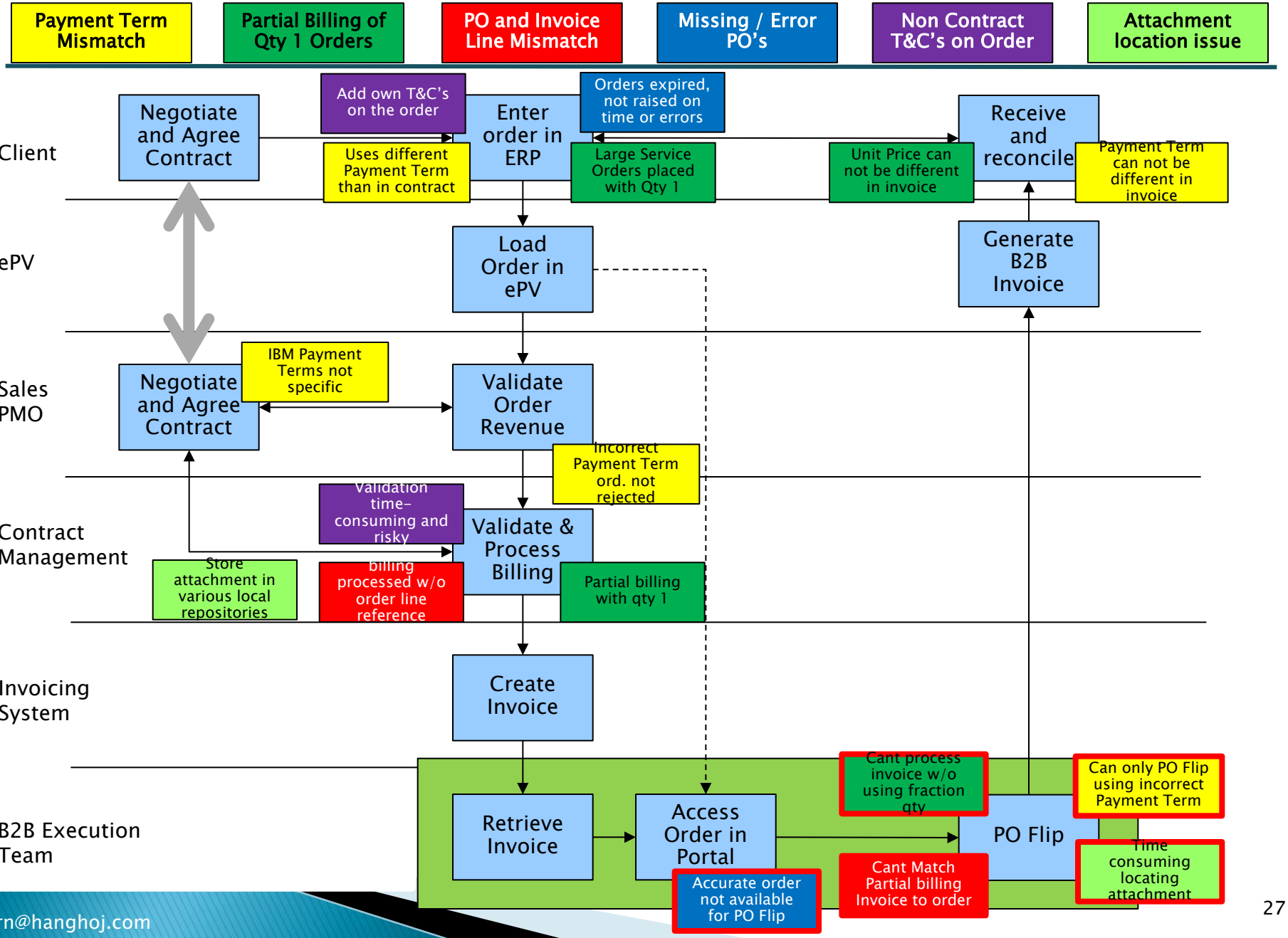
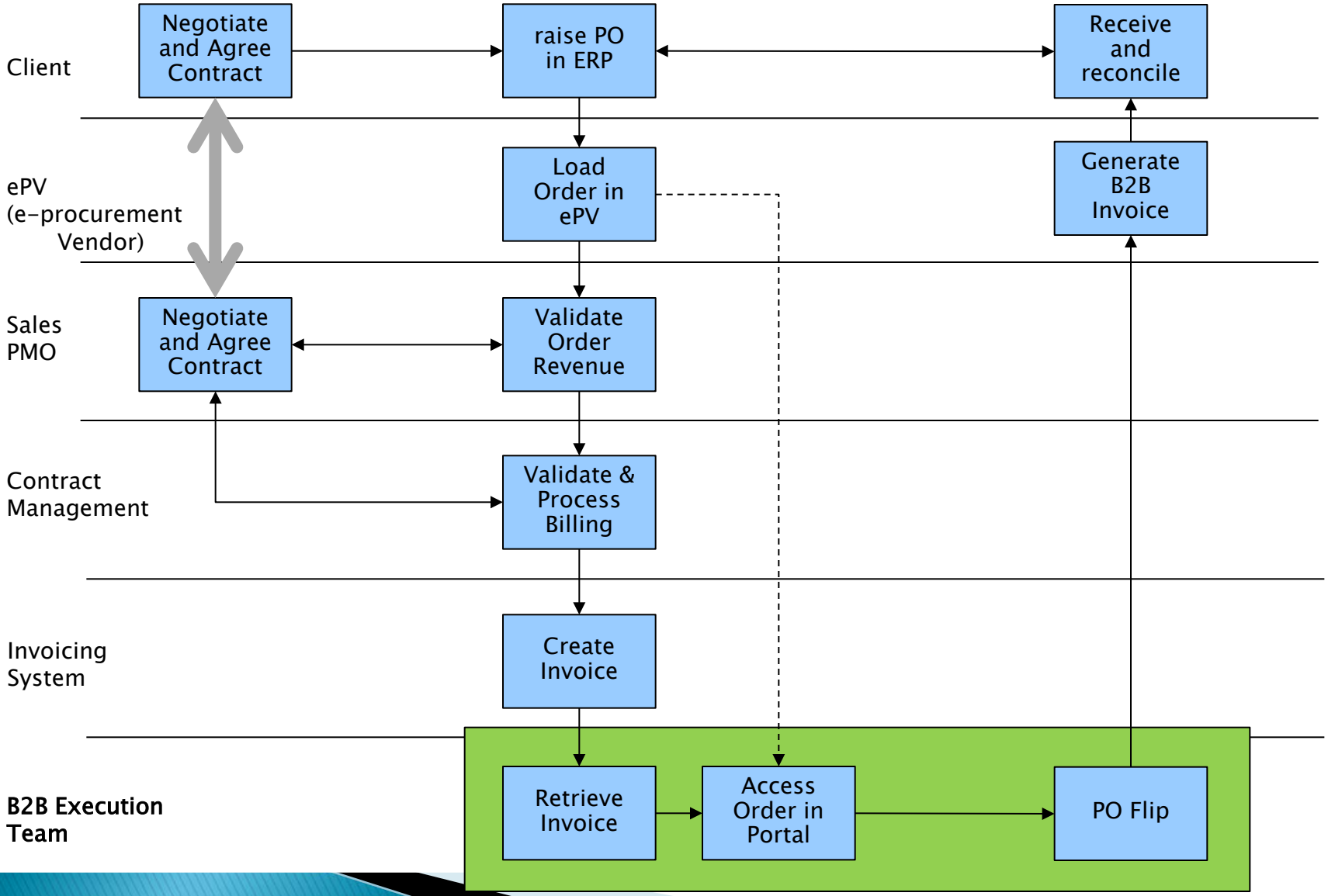


In Summary

High Level Process Flow

E2e Procurement and Invoice process



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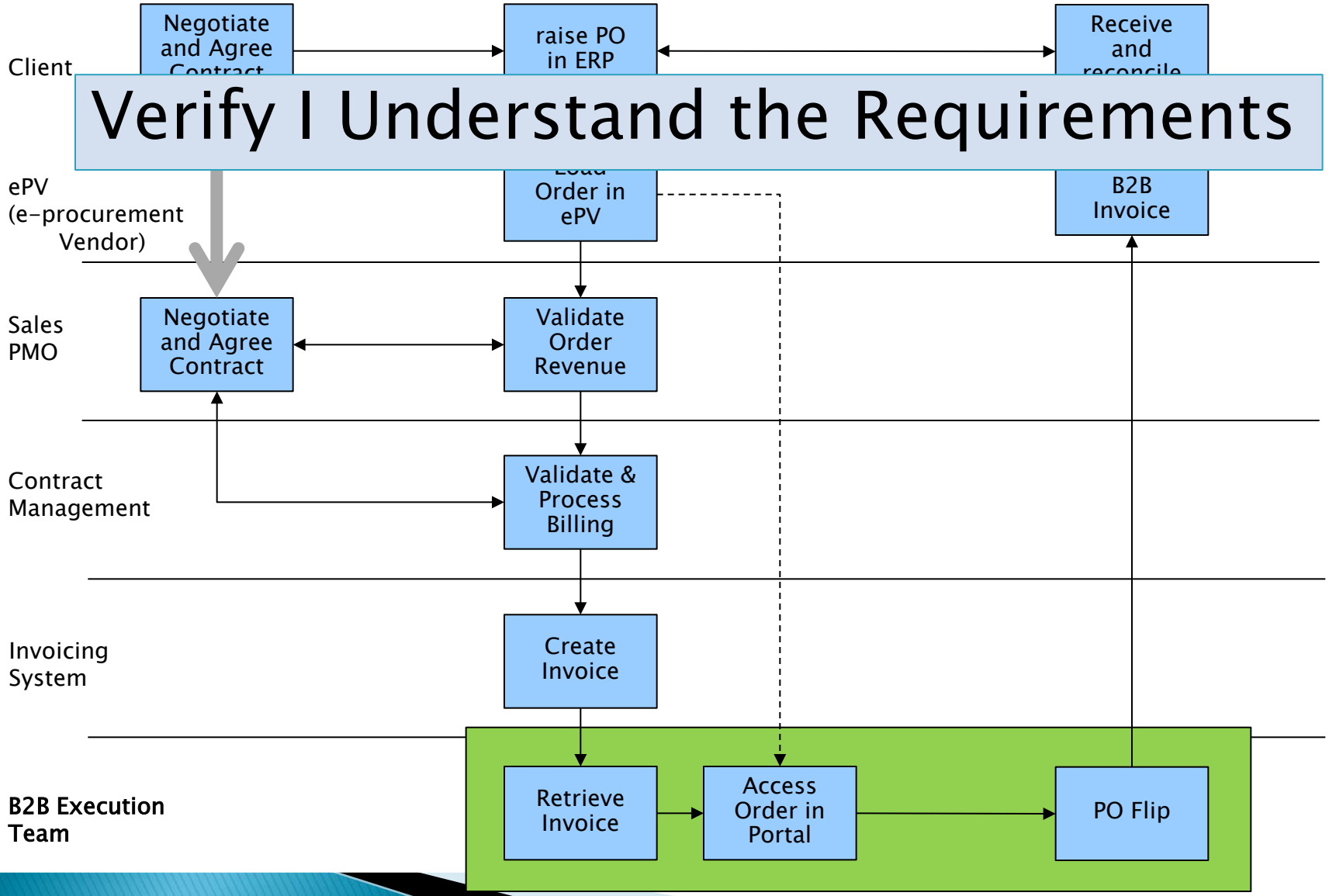

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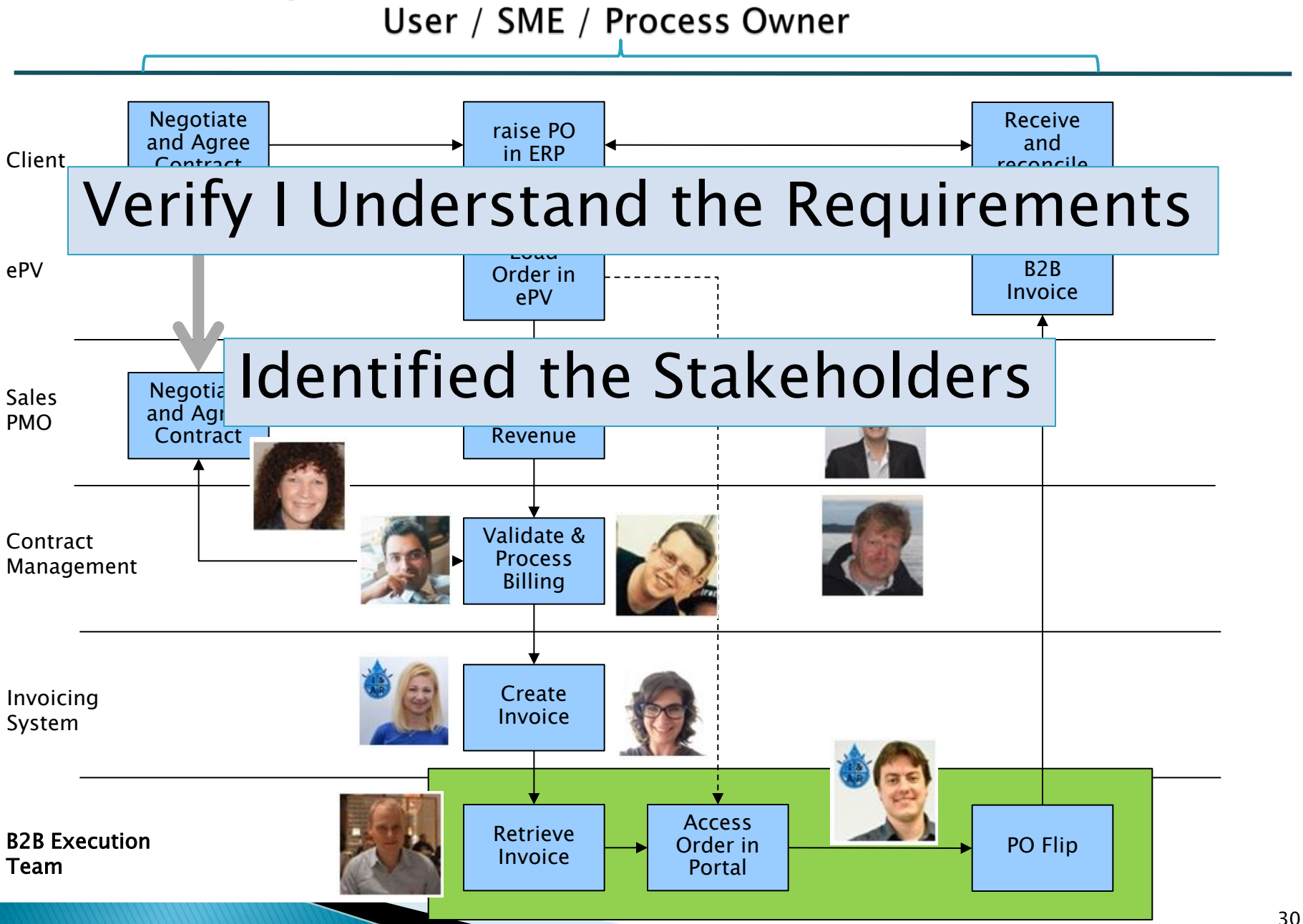
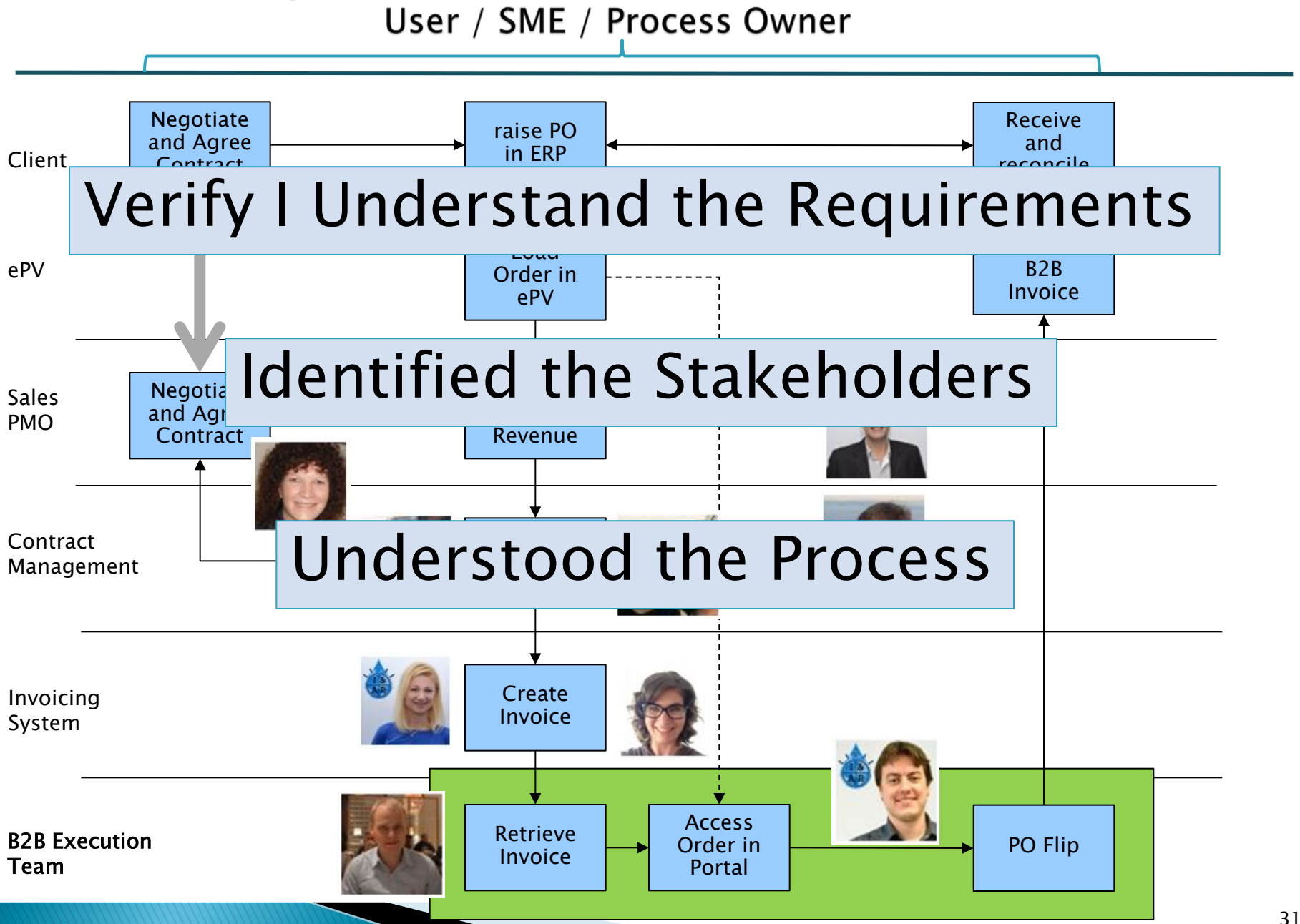

User / SME / Process Owner
Client
ePV
Sales PMO
Contract Management
Invoicing System
B2B Execution Team
Negotiate and Agree Contract
raise PO in ERP
Receive and reconcile
Verify I Understand the Requirements
Load Order in ePV
B2B Invoice
Identified the Stakeholders
Negotia and Agr Contract
Revenue
Validate & Process Billing
Create Invoice
Retrieve Invoice
Access Order in Portal
PO Flip

In Summary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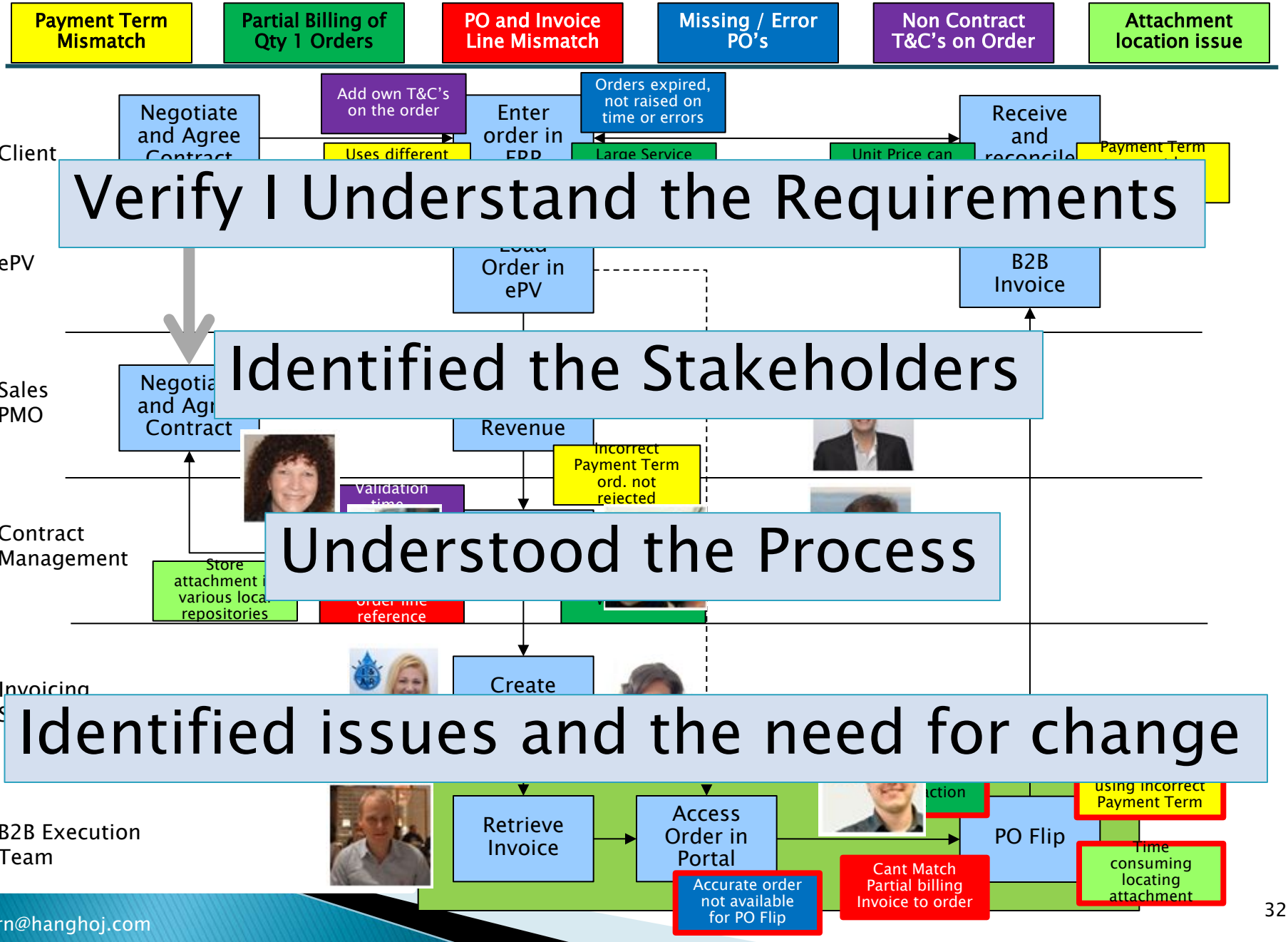
In Summary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PO and Invoice Line Mismatch
Missing / Error PO's
Non Contract T&C's on Order
Attachment location issue
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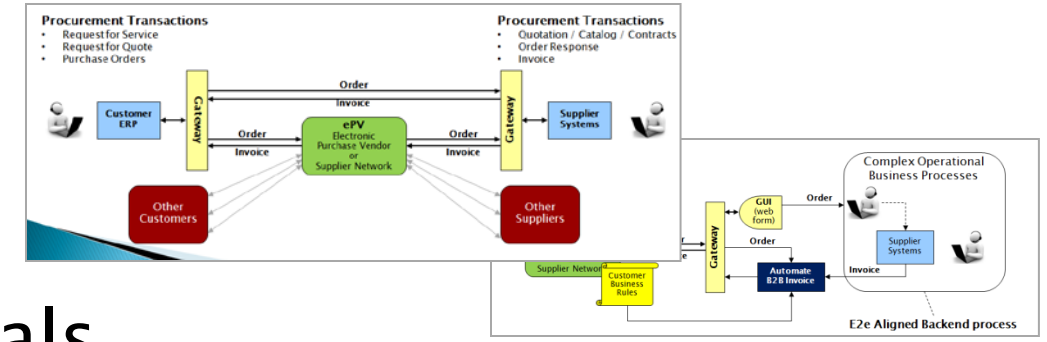
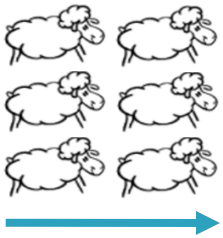
B2B Execution Team
Negotiate and Agree Contract
Add own T&C's on the order
Enter order in
Orders expired, not raised on time or errors
Receive and
Payment Term
Uses different
Large Service
Unit Price can
Verify I Understand the Requirements
Order in ePV
B2B Invoice
Identified the Stakeholders
Revenue
Incorrect Payment Term ord. not rejected
Validation
Understood the Process
Store attachment
various loca
repositories
reference
Create
Identified issues and the need for change
Retrieve Invoice
Access Order in Portal
PO Flip
using Incorrect Payment Term
Time consuming locating attachment
Accurate order not available for PO Flip
Cant Match Partial billing Invoice to order

1. Understand overall requirement
2. Identify the Stakeholders
3. Understand the process
4. Understand issues or need for change
5. **Key learning points**

Key learning points



- The benefit of visuals
  - Enables Quick Understanding of Business Model, Issues and Project Objective
  - Provides a Visual Concept of the project
  - Enables and encourages participation from stakeholders
  - Allow stakeholders to correct and improve BA's understanding
  - Highlight different understanding within the stakeholder team
  - Allows alignment of stakeholder understanding
  - Causes team to start thinking about the issues and how to address them
  - Most Important: Brings everyone on the same page and establish a good base for further analysis



Questions?

bjorn@hanghoj.com

Key learning points

- Socialise Proposal to strengthen it
  - Share proposal as wide as possible and ask for feedback …..
  - If agreement – more stakeholders agree = stronger proposal
  - If disagreement – analyse and adjust as appropriate = stronger proposal
- Change management as a bonus
  - Including User, SME and Process owner in analysis and resolution
  - automatic buy-in and agreement from people who will implement
  - Change management for free!
- Instant Resolution
  - Including technical stakeholders on process mapping calls (if possible)
  - They will understand better what they have to build
  - As issue encountered, propose possible solution to user. If acceptable ask whether technical team can build – they usually can – problem solved.

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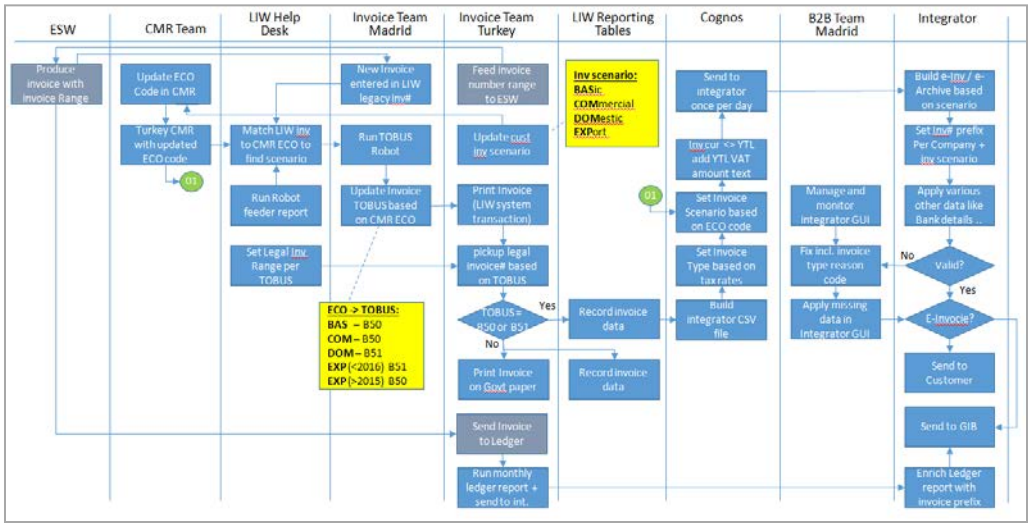
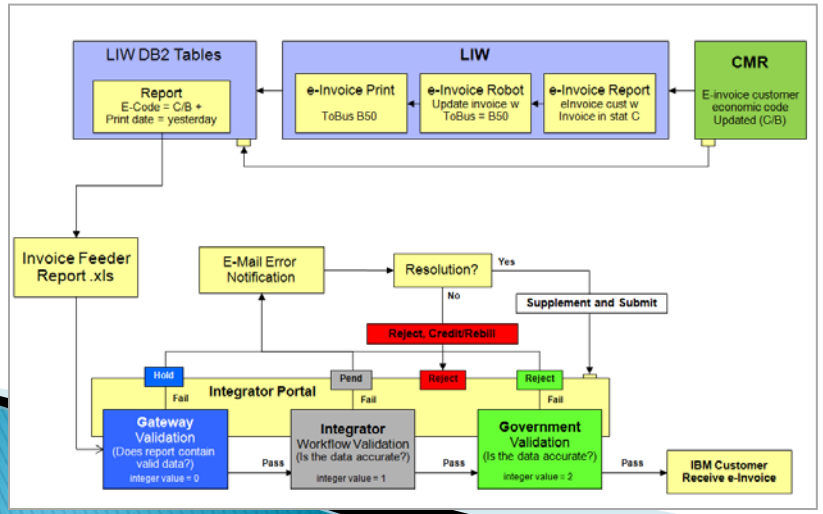
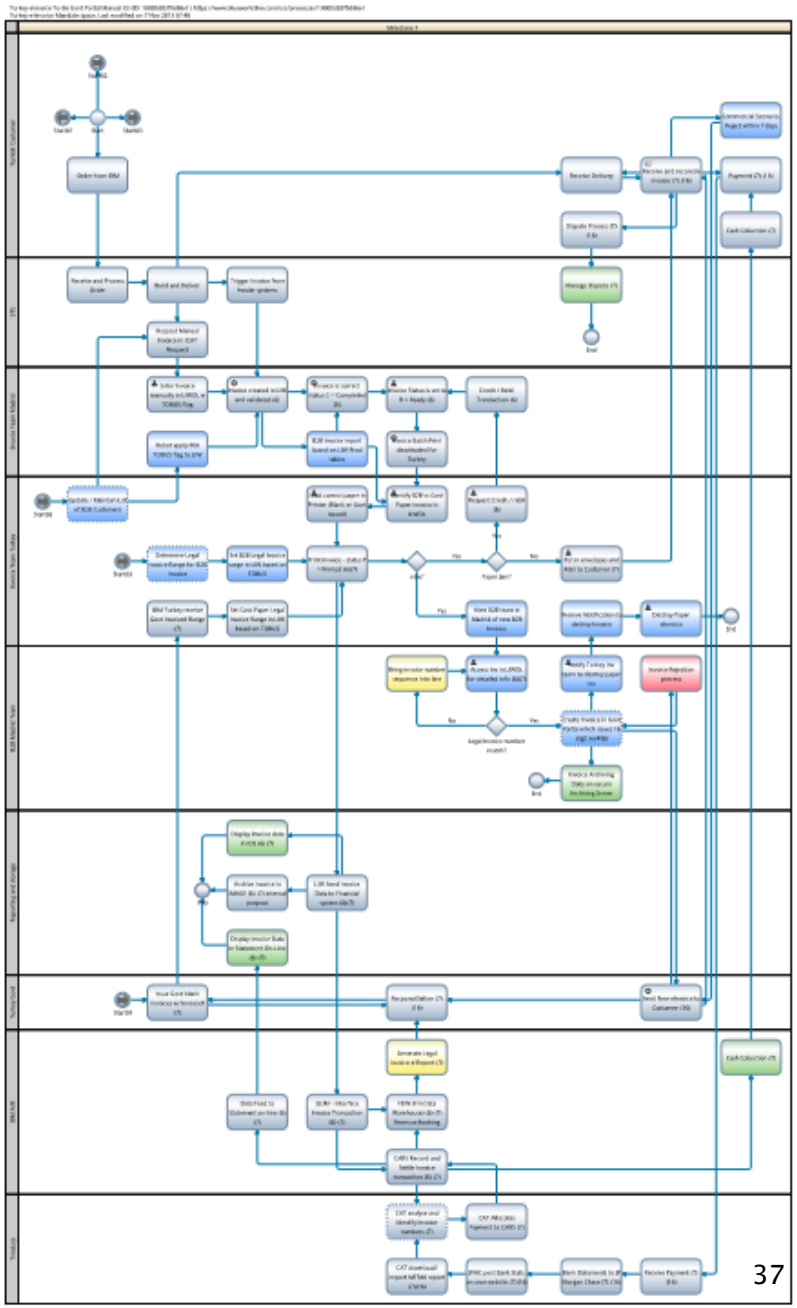
Key learning points

- Use of process diagrams
  - Powerpoint





- BlueworksLive



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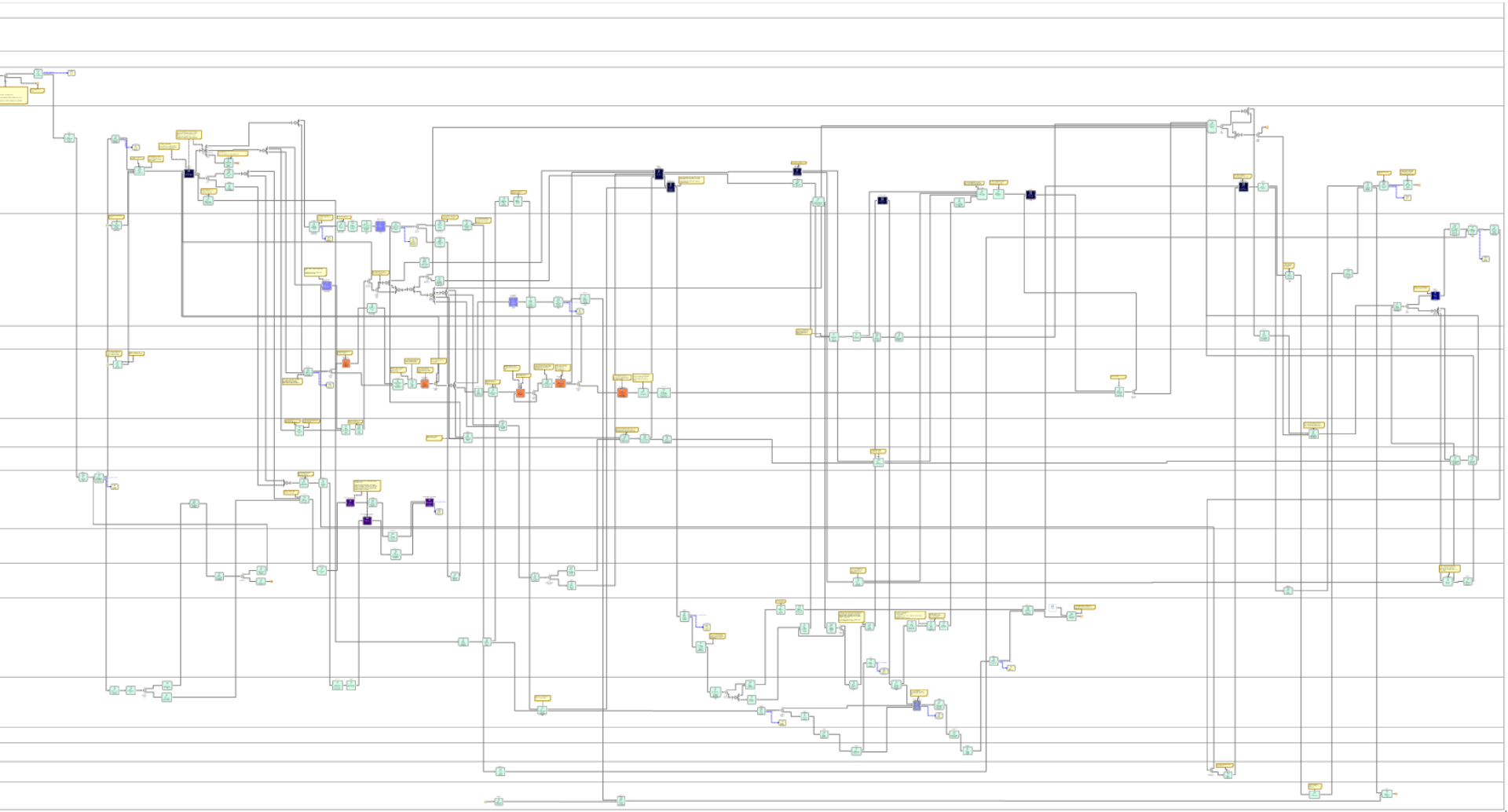
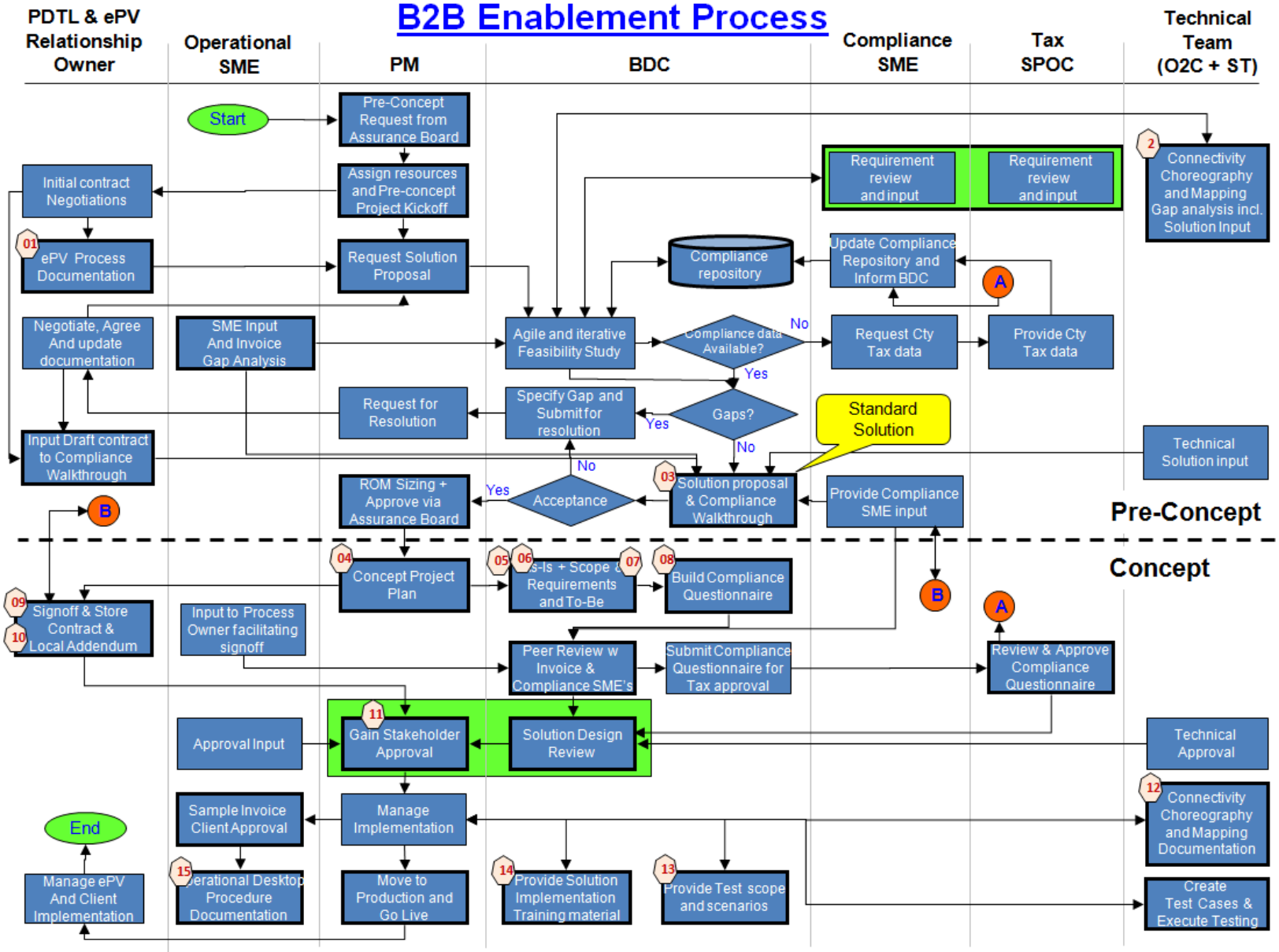
Key learning points

Poor visual value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