

BA is new superpower

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Ian Gotts: [00:00:00] So welcome to this webinar. It's titled Business Analysis is the New Superpower. But I'm not sure everybody realizes that. And what I wanted to get to do today was get together a couple of rock stars from the Salesforce ecosystem who care about business analysis as much as me. And I wanted to get their perspective.

I mean, I've been on my soapbox for over 30 years talking about the importance of business analysis. I was looking, I think, I drew my first process map 38 years ago when I was working for Accenture, mapping out an ERP system. Yeah. Vanessa's going really, but it's really important, but, I'm not sure we're necessarily seeing that in the Salesforce ecosystem.

So I wanted to get, really have a discussion with two people who really respect their, their opinions. They're, they care passionately about business analysis. So we've got Caitlin Graff. She's a [00:01:00] Consultants, got a blog that she writes about business analysis. and we've got Vanessa Grant. I mean, I think everyone's seen Vanessa.

I mean, you look at the picture there, BA badass. if you've seen her on, speaking at Dreamforce, TDX and webinars. So again, a huge voice about the importance of business analysis. So first of all, thank you for the two of us joining, for you joining. So can I just set the scene for a moment, in terms of what I, what I think I'm seeing, and then let's, let's launch into this.

So first of all, I think there is a huge level of technical debt. And my view is a lot of this is due to poor business analysis. The, can I just have a field? Can I just have something? And if we look at those numbers, they're quite frightening. The number of custom objects that get added, that's no, not managed packages, but just the, the, you, I've had feedback, someone passionately said they wanted it, you've argued over the name, you've decided what to do with it, you built it, you deployed it, and [00:02:00] nobody used it.

Clearly you didn't waste any time documenting it, that's fine, but it's still out there. But 40 percent of custom, no, nearly 50 percent of custom objects are never used, and 40 percent of fields never get populated. And that's just a huge time waste. but also I think there's another impact of that, which is, think about all those fields that end up on page layouts.

That's a really scary number, 150. Fields on a opportunity page layout.

Vanessa Grant: Yeah. I had a, I had a client once that had, they hit the limit on their account on the, on the number of fields that they had on their account. So they had to have a second account object that looked up to it so that they could put more fields cause they needed more than 800 fields for some reason,

Ian Gotts: that's got to be wrong.

Oh,

Vanessa Grant: it was.

Ian Gotts: We've made it way too easy to start to. To add things and I think that's really where the [00:03:00] business analysis piece is really important But but I also want to add one other bit before we launch into this which is I I think we're seeing quite a big shift in terms of salesforce, but it implementations are becoming more complex Okay, they're broader in scope which means that more people are involved, uh is actually more strategic So no longer is it like five users.

If we build stuff, it doesn't really matter. And we're talking about all these fields on a, on a opportunity. You've got a hundred reps who are looking at this page every day. How do they get out of it? They hit save. And then anything that's read, they just put whatever data in and then try and get out. So the implications of this are suddenly quite important, but let's just go to one other step, data cloud.

I mean, anyone who's listened to Salesforce over the last, Probably since TDX last year and obviously Dreamforce, this year. Data cloud is, is front and center. And everything that Salesforce is saying is that 80 percent of data cloud is, is [00:04:00] planning. 20 percent is configuration. So again, huge emphasis on the, the business analysis piece.

So with that as a backdrop, I mean, clearly the three of us, I think it's really important, but let's start with you, I guess, Vanessa. Are you seeing this importance recognized in two places? One is in customers, and the other one is actually in Salesforce.

Vanessa Grant: No, not yet. I feel like it was kind of two steps forward and one step back.

we were, I think, making progress on evangelizing the business analysis role in a post COVID world, when people were realizing how, how, Much business analysis supported the success of these salesforce projects and salesforce. I think also realizing after they had customers that were 5 10 years into their orgs and they were going to have to, you know, destroy them and rebuild them [00:05:00] because they were so poorly architected because they didn't have that business analysis in it in the first in the first place, you know, you saw salesforce.

Putting out the user experience designer cert, the business analysis cert, and really focusing on the things that were needed, the admin skills kit, the things that are needed to maintain an org's health. and then I think in the last, I don't know, it feels like it kind of shifted back in the last couple of years, where even.

In applying to speak at Dreamforce this year, they weren't looking necessarily, you know, if you, if you looked at the things that they're looking for, they're, they're pretty specific about the things

that they, they are looking for in the selection process. And it wasn't, Hey, how to use business analysis?

What are the skills that you need to maintain your org? It was, Hey, how can we come up with multi cloud solutions? How can we, you know, sell AI? And those, the, the, the things that we see that are getting picked. So I don't know that Salesforce is really Putting in the emphasis on business analysis that it should, they were on the right track [00:06:00] and they're like, Oh no, it's not making us money.

It's a, and so, we have, veered. and I think that bleeds down to the clients just because of Salesforce isn't pushing it. Then the clients don't know any better, especially the newer ones.

Ian Gotts: The two of you are both consultants. So, I mean, surely there's a responsibility. I mean, Caitlin, you, you spend time with clients.

Do they, do they recognize this as important?

Caitlin Graaf: I think from. From my side, I often see clients go through a little bit of an educational transformation where there, there's a difference between a system and a solution, right? And when you procure Salesforce licenses, you get access to a system, but not necessarily a solution for what you need to do.

And for me, business analysis is that Secret ingredient that goes in moving from systems, actual usable, viable solution. And I think what tends to happen is [00:07:00] before clients really understand the process that you've got very nicely documented up on the screen at the moment, they often want to move quickly.

And we as consultants also often fall into this trap of wanting to deliver value to the client very quickly. So perhaps we shortchange some of these very important planning steps. And it does take some time and a little bit of an educational effort and a very deliberate process from the consultant side to say, no, let's actually slow down and make sure that we are not just a little term that I like to use, not just building The thing right, not architecting a viable solution, but actually building the right thing that should come first, we think of this whole architectural picture.

We should be building the right thing for the client. For me, that's where BA sits. And then we should have our architects come in and whether that's one person or that's two people or that's a whole team of people [00:08:00] doesn't really matter. But we should be building the right thing, and then we should be thinking about building it right, and all the rest.

But I do think that there's It's much more of an educational effort that we could do to bring clients into that longer term thought process.

Ian Gotts: I think we're also up against a far bigger marketing machine. I think Vanessa made the point, which is, like, people come back from Dreamforce going, Oh, I watched this video and this will only take two minutes.

And the answer is, well, that's not quite true. And I think, as consultants, or if the people who are listening are, you know, You're an admin or an architect inside your your your company and you're the business users going well This shouldn't take that long being able to push back and say no. Okay, give me time to understand what you really want And therefore, I will build the right thing for you, but I don't know what that is.

I think that those earlier slides, which I showed with those numbers, they came out of a change intelligence research piece of [00:09:00] work we did. I know Vanessa commented, was one of the people who actually, you contributed to that, so thank you. But that, using that as sort of evidence, so you can go back to your, When the business user is going, this will only take two minutes.

So no, it'll end up as another one of those things, which is sitting on the pile, not being used. And I think we need to give people the, the tools to push back and go, look, fine. Running quickly means that we'll actually run in the wrong direction. So let, let's, let's pull back. So I think that's part of the education as much as just waving the BA flag is trying to give people the, either the tools to, to explain why that actually, this is a better answer.

Vanessa Grant: I actually, ended up writing, an article recently on 10 questions to ask for that common question of, you know, can you just add a field because it's the just add a field without actually realizing, you know, the Pandora's box that's underneath it. And one field request could really, I mean, it could be an object, it could be a whole different [00:10:00] solution.

It could be, there's so many things that are important to. Even the smallest kind of configuration change needs to be supported by the business analysis to to Caitlin's point to make sure that we are building the correct thing.

Ian Gotts: Is there any change you'd make without doing business analysis?

Vanessa Grant: You know, I think, I think maybe It would only be if I had already done the business analysis and it was well documented.

So then I would feel a little bit like, so for example, you know, if, if somebody asks, Again, another kind of small request, like, oh, can we just add something to a pick list value, you know, to a, to a dropdown. Okay, well, that could have implications outside of that pick list. So let's, let's talk about it.

But if it's, you know, a process that's well documented, [00:11:00] and I know that there aren't any dependencies, and I think that's where, doing some, you know, the, the business, Analyst

being able to do some org analysis as well. and understanding what, what the implications of that is, you know, something like that.

Maybe I would do less, but it would have to have, it would have to be built on, on top of business analysis that already happened in my mind.

Ian Gotts: I am. So you just said. No by saying yes, which is quite clever. Thank you.

Caitlin Graaf: But the point is, you know, you're a consultant.

Ian Gotts: But what you just did was provided it was documented and I'd already done the analysis and I knew there were no dependencies.

Well, hang on. That is what business analysis is. Knowing all that stuff, so actually, yeah, to a certain extent, there's nothing, I mean, fine, create a report, yeah, okay, fine, there's limited implications in that, but anything that's going to be a configuration, if you've got to go near setup, probably the answer is [00:12:00] no, we shouldn't be, my view, you should, you should be at least doing a level of analysis, it may be very quick.

But unless you understand the implication, picklist on the stage field on opportunity. Yeah, okay, probably quite a lot implied in that. So therefore let's, let's not just add a picklist value. Sorry, Caitlin, I think you're about to say something.

Caitlin Graaf: Also, I just think it's funny anytime you ask a consultant to give a straight yes or no answer.

It's like our kryptonite. but yeah, Vanessa, I think you bring up such a good point in that The, the salient thing for me here is that if you, the longer you go without doing good business analysis and documentation, the more expensive it is to make minor changes later. And I think that goes back to the original point of how do we start to educate clients about the importance of doing business analysis, in flight and up front, because if you've [00:13:00] got a very mature org that is technical, that has a lot of automation, that is integrations, whatever, those little changes, adding a field, changing a pick list value could have major impacts.

And if you are not fluent with that design, you have to go and do that org analysis, which is Very, very costly. But if you do have that good corpus of documentation and you do really understand the org, I think that's when you get into those minor changes where you can, from an authoritative perspective, say, okay, we have A pretty high degree of confidence that we can make this change without all of these scary unknowns that then become absolute chaos to go and fix afterwards.

I think the, the question is really important for clients to consider how much time and effort. Will we spend later if we don't do this now? [00:14:00]

Ian Gotts: I was looking at the chat and there were people going, Oh, but hang on, but doing analysis, ends up that kills agile and maybe you can do too much planning. I think we need to swing the pendulum from like, we've done nothing.

When you look at the data in terms of all that to the other end is I'd love to get to a situation where someone says we're doing too much planning. I don't, I can't think of it, any, at the moment, any clients who are doing that. And I think we've got to get to the other end. And I think, The whole agile thing, which is, Oh, it's agile.

We just do stuff. No, that's not agile. Agile was about putting smaller pieces of work well planned, well documented, when analyzed and delivered quickly, it's not, we'll throw stuff in, if it doesn't work, let's have another go, have another go, have another go, have another go. And I think agile has been.

hijacked, I think, by a lack of discipline. so I think that the whole, I don't think, I don't think we'll find in the ecosystem yet people doing too much planning. so what, one thing, by the way, data cloud, if [00:15:00] you don't do that 80 percent right, the planning correctly, It will not work. It's not, it won't work very well.

It will not work. If you get it wrong, you have to unpick everything you've built and start again. There is a massive, massive premium on actually doing the planning correctly. And by the way, we say this, we've already, we've implemented data cloud internally, and which is where we documented the business process for how you implement data cloud and our experience.

And this is also backed up by Salesforce, which I put 80 percent planning. The team have told me it's more like 90 percent planning. It's 10 percent build. Once you've done all the planning correctly, the build is quite straightforward. And the data clouds consultant certification is all about that 10 percent or that 20 percent is built.

All the upfront planning, you've got to get that right. Otherwise, it's not, as I said, it won't, it won't work very well. You will be spending credits but not get any of the data out [00:16:00] at the other end that you need. So you've got any activations. So you get zero results. And I think this is an interesting shift we're seeing in Salesforce.

That, okay, more complex, more strategic. You put Data Cloud in there and suddenly BA is premium. So maybe, I mean, the start of this conversation was, Is BA becoming more, business analysis becoming more important? I think Data Cloud is a forcing function that says unless you do the analysis properly, That don't even start don't start data cloud So it'd be interesting to we have this conversation a year or two's time when data clouds more prevalent Be interesting to see how much this has shifted Can I can I move the conversation on on a little bit and just think about okay?

I'm in the demand for this. We've just said we think it's important a 10k advisors put out a a talent survey every year and This is quite concerning market demand. I mean, you can see

across the patch demands down, but I would have thought the one thing that would have held up would have been [00:17:00] business analysis, and it's down the same as everything else in terms of of the demand.

And I think what's interesting in the next slide. The supply, again, different, different style graph, but the same thing, the supply of business analysis has gone down, which suggests that people, maybe not as many people are excited about it. Now, Vanessa, I think you've been involved in this year's report.

I'm not sure how much you can talk about it.

Vanessa Grant: I mean, I think it's just kind of not a great time in the, in the ecosystem. I, I think, we've, With, with business analysis, I, I can't talk about it, too much. I'll let 10 K, you know, put out there their, report, but, it's just not a great time in the ecosystem, but at the same time, I do think the, I mean, the BA role is not going anywhere, but I think there's also just Salesforce ecosystem, folks having different [00:18:00] understandings of what that role is.

Thanks. You know, in terms of a Salesforce org, I have still yet to see BAs that mostly stay in that BA lane. You know, it's usually some admin slash QA slash BA slash, you know, consultant. It's, it gets so mixed up still. And, and I think that's partly Salesforce's fault for, for not. Having a dedicated, you know, like there's no ba.

salesforce. com, but we have developer, we have architect, we have admin, like, where's, where's our microsite? So, people are just kind of making up what that role is. So, yeah, I mean, it's, it's, the, the industry's not doing great. but, the BA role is still strong. What it actually is going to end up looking like.

I think that's the thing that I would like to see.

Ian Gotts: It's not a role necessarily, it's a set of [00:19:00] skills, because they say those skills could live anywhere. Maybe that's what's happening. I mean, just a quite side note, I was having a conversation yesterday with someone who, oddly enough, was at Accenture probably about the same time as I was.

And we had things called green books, which were like the equivalent of Trailhead, but a lot more detailed. It's like halfway between Trailhead and Certs. And he said it's almost as though people missed out on the business analysis of this. training courses and I went, I always stop. There aren't, up until two years ago, there wasn't a BA training course.

There was the cert was, what, two years ago?

Vanessa Grant: I think the cert was two years ago, but, I think it was maybe 2020 that it, that it started off as like even just a career path on Trailhead. And I mean that's, you know, that's like 20 plus years of, of, you know, not even, you know, a hint of business analysis on Trailhead.

No wonder we're, we're three doing orgs. [00:20:00]

Ian Gotts: Yeah. Okay. So, so let's just, let's, okay, let's, let's move the conversation on and let's think about, what we think some of the BA skills are. And again, there's some technical skills and soft skills. So, and let's jump in and let's try and highlight some of the skills we need.

So let's think about not, it's not a BA role, but people out there need BA skills. So what are some of those skills? And let's, let's try and list some of those out.

Caitlin Graaf: Perhaps starting at a, at a high level, I think it's quite important to differentiate whether you are a business analyst as a standalone role, or you are someone who is performing business analysis tasks.

For me, it, it breaks apart into two larger functions as well. technical side? Like, are you a technical BA who is fluent with the technology? Are you a Salesforce business analyst, for example, who can speak fluently about the platform and perhaps [00:21:00] provide a layer of very lightweight architecting of being able to match requirements to solutions.

You might not be designing bespoke features, but you understand what, you know, an approval process would do or what you would use flows for, etc. And then there's the other side of this, which is more of the, the functional side. And are you a sector expert? Are you an industry expert? Are you a BA that specializes in nonprofit use cases or, marketing or whatever, whatever the industry or the sector is?

so perhaps that's a little bit of a higher level answer to your question, but I think. And I think for anyone on the call who's thinking about this as a career, useful to think through where your skill sets lie and the technical side of that versus the functional side of that and how you can maybe combine the two as well.

Vanessa Grant: Yeah, [00:22:00] I'll throw in. I don't think you can really call yourself. Self a Salesforce business analyst, unless, you know, Salesforce, like that's, I mean, that's the, that's the whole thing. I, I, I was, I raged, I think on LinkedIn when, they removed the admin certification as a prerequisite for the BA certification.

Cause it's like, well, how are, how are we calling ourselves Salesforce BAs then? Cause if you don't have that foundational knowledge in, in the Salesforce platform and you go in on a complex project, you're, You're just, your stories are going to turn into a whole bunch of custom, custom objects, custom, this custom, that, because you're not going to know any better.

so I think those technical skills, even not even necessarily being like the hands on person, but understanding, data modeling and, and how everything relates to, to, to things and what the capabilities are of the, of the platform, I think are really important, as well as, I think [00:23:00] business analysts are in a great place, especially in an agile environment to, do end to end



testing, under, cause, cause, Part of the soft skills is having the empathy and doing that almost kind of business therapy with those end users to really understand their pain points.

So if you can be there at the beginning and then also be there at the end for like the sprint demo and put together a great demo because you understand what that user is going to go through and also be able to do the end to end testing. How do all these user stories come together to develop a feature and Geez, understanding those users the way that I do.

Do I feel like they would still like this? Would they still use this? empathy, I think is one of those powerhouse skills that a BA has that we can put ourselves in the shoes of the end users throughout the development lifecycle.

Caitlin Graaf: Yeah, a hundred percent. I think if I can add to that [00:24:00] point, some of the most adept BAs I think that I've seen in my career are people that are really good at telling the story of the business and how the solution supports that business. You've definitely got the folks that read through a hundred user stories or just give the client a hundred user stories to read.

And no one, no one can understand a solution like that. It's just not how our brains. Work. So yeah, a hundred percent being able to really empathize with what the pain points are and talk someone through in a very plain language, not jargony way. You can understand the technical stuff. You can speak the technical language to the technical stakeholders, but just being able to tell the story of how the solution supports the business is.

Super critical.

Ian Gotts: So what I'm hearing here is number one, these are skills that you need, no matter what role you're in. Obviously, if you're a dedicated BA, then clearly this is a hundred percent of your world, [00:25:00] but actually for most people in the ecosystem, the skills we're about to talk about are relevant.

I must admit whenever I'm speaking at events, I always ask who, who's done the BA cert. And, it varies. It could be 10 percent of the audience. It could be half the audience. My comment is always. Everybody else, even if you don't try and pass a cert, go and do the training, because these are skills which are relevant, you know, whether you're an architect, whether you're a developer, and whether you're, certainly for an admin, you certainly should be to be growing these skills.

And again, as As we said at the beginning, Salesforce is becoming more complex. These skills are going to be more important. But you've also, you've, the other thing you called out some things. We've got some soft skills. I mean, empathy, the ability to tell a story, the ability to facilitate a workshop, the ability to, I mean, I think the other word you said is business therapy.

So, here's a process map. Show me where Salesforce hurts you. Point to where Salesforce hurts you on this process [00:26:00] map. It's just, so there's, there's a lot of that, which is, so a

lot of those softer skills, which actually probably the most difficult, but, but the ones that actually, as you said, have the biggest impact.

I think the other thing you said was actually put yourself in the shoes of the end user. Would they use this? It doesn't matter how clever the thing we built is, if they don't use it, then it's all irrelevant. So I think there's some of those softer skills, workshop facilitation, and um. questioning, that empathy piece.

Can I focus on what some we, some of the technical skills are? I think you said data modeling was one of the things I, I heard. What else would be on that list?

Vanessa Grant: Business process mapping, I would think is a technical skill. I think that's, that's core to the, the BA role. you know, you, you have to have the, the proper map, with all the steps before, they can point to where Salesforce hurts you.

but it's also [00:27:00] a. Technical tool to communicate effectively. And I think business process mapping is, is challenging to do well sometimes, but, Visuals are so powerful. particularly when you're, when you're on Salesforce projects and working with business folks.

Caitlin Graaf: yeah, just to add to the, the business process mapping, obviously those Different notations for that and being fluent in the various notations and which is fit for purpose for your use case.

I think also moving from just business process mapping to a little bit of business process re engineering as well. And applying that critical layer of thought to say, okay, cool. This is our as is process. How can we given the Set of technological tools that we have given all of the tools that we get from the Salesforce platform.

How can we make this better? And I think that's a [00:28:00] little bit of a confluence of. The soft skills, the communication, the facilitation, and the technical skills of understanding the platform and understanding the sector. And as those three sort of knit together, you can do that really, really valuable work of taking the business process and making it smoother and slicker and nicer.

Vanessa Grant: Yeah. And I think it's also to add something, I think. The, and we touched on it earlier, some of that org impact analysis is, is important. I think, It's, it's even part of the research oftentimes before you even speak to, somebody who's, requesting a, a change to the, to the system. Okay, well, what's already in the system and, and while the BA may not ultimately be responsible for the solution, I think it's important that they understand what the current state is and being able to navigate the system is really important to understand that current state [00:29:00] and also to, Okay.

What one of my favorite things that I've heard you say, Ian is, you know, coach the users into what's possible.

Ian Gotts: I think it's also about setting expectations. So I think if you're the business analyst and you're going, well, how long is this going to take? If you don't have any understanding about whether it's three months or three days or three hours, you're already setting an expectation.

I think back to the very beginning of the conversation, often Salesforce's AEs set the expectation, which you have to unpick. This will only take you two weeks to implement because they want to get the deal done. And the answer is, that's it. You've got to talk the customer back into, well, actually this is more like two months for the first sprint.

So I think as a BA, you have a responsibility at the early stages in terms of setting expectations. So can I, what about, what about some of the architect diagrams? So I think like capability maps and data flow diagrams and entity relationship diagrams, the process, the. They feel like they are still relevant, even though they [00:30:00] are, they've been developed by the Salesforce architect team.

So they've got, they've got a diagramming notation called Salesforce diagrams. They feel like that, even though it's architect. salesforce.com, it feels like they are BA skills that you need to master from a technical perspective.

Caitlin Graaf: Yeah, 100 percent I would agree with that. I think getting fluent in Salesforce and non Salesforce notations as well, like regular old fashioned data architecture notations as well that Salesforce architects does use that Salesforce in platform doesn't necessarily use.

All of those diagramming and notation tools so that you can take perhaps a client that is not on Salesforce at the moment and migrate them onto Salesforce in a way that is consistent with other Salesforce implementations and the future work that they'll be doing in Salesforce. It's just completely critical and there's such a good, just wide and deep body of templates [00:31:00] out there from the architects website.

It's yeah, very, very important. I think I

Vanessa Grant: would also. Emphasize here and maybe this is just my point of view on it, but I think while it's really great to understand how Salesforce is diagramming and, you know, understanding formal ways to business process map and and things like that, that ultimately. I think those are communication tools.

So the more tools you have in your tool belt, the easier it is to communicate in different ways, depending on what your audience is and what you're trying to communicate. The, I think that's where the soft skill comes in is how well are you good at matching those solutions, those tools to, what it is that you're trying to communicate.

That's, that's the soft skill that is connected to, to that. Cause ultimately, I mean, I'm sure everybody's had that experience where somebody's like, okay, here's the business process

map. And you open up this, you double click into this PDF that takes like five minutes to load. And you're like, nobody's [00:32:00] going to look at this.

You've communicated. All you communicated is fear or generated fear within me. Cause I'm, I'm afraid to dig into this, you know? So that's, that's part of the, I think the, the, the BA skills as well.

Ian Gotts: But as I'm hearing this. For anyone who's in the audience going, Oh, I really want to go and be a consultant because I've got strong Salesforce technical skills.

I can build stuff. The answer is no, no, no, no, stop, stop, stop. The things we're talking about here are critical consulting skills that we're talking about. And I think if anyone has any aspirations to move from being employed in an organization to go and join a consulting firm. Then you need to get the BA cert.

I mean, if I were an SI and I'm not, but hiring anyone who doesn't have a BA cert would be a big red flag, I think, probably at the moment. Because I think the BA cert is quite good. It does feel like it covers a lot of the role type, a lot of the skill sets that you need. So, by the way, this discussion, [00:33:00] the, I've been just keeping an eye on the chats on fire in terms of the discussions that are happening.

So everything we're talking about is absent landing, which is, which is fantastic. Let's just move on if, if we can just think about, I know that, I don't think we probably cover this, but there's an intersection here between a year of full time architect. So your full time BA or full time admin, these skills we've just talked about are that intersection.

And I think that's, that's really important that, that everything we've talked about are, are core, I think, core career skills, if I put it that way. You're always going to use those communication skills you've talked about. You're probably going to pull out a process diagram at some point to describe something to somebody.

You're going to always need, An architect who doesn't understand how, well, how the data is architected, it's kind of not going to work. If you're trying, you're doing anything with round data clouds, this stuff's really important. So I think there's a, again, a group, a grouping of skills, [00:34:00] but are we seeing dedicated BAs and dedicated architects yet?

Or do we, do we think it's a joint, it's a, this is a set of skills inside a role?

Caitlin Graaf: At least, I'll speak from my own experience working as a solutions architect in the non profits social sector. At, at the moment, I think we are struggling to differentiate the business analysis role from a sales perspective.

The clients, particularly on the, On the smaller side, sort of small to medium sized organizations that might be a little bit budget sensitive. Are having a little bit of a hesitancy towards adding

what from an optics perspective looks to them like an additional role in the project team that comes with a billable rate per hour and all of that.

But again, going back to the idea [00:35:00] of educating clients as to what a successful project implementation and implementation team looks like, I think for me, or at least in what my role has been as a solutions architect. For me, it breaks down into three pillars. Essentially, you are responsible for the technical integrity of that org.

You are responsible for the business analysis. So again, building the right thing and then building the thing right. And then you have a leadership role to play in that project, taking responsibility for the relationship with the clients and the, the, the system long term, I think if we can get to a point where we are more reliably breaking out the business analysis piece from that architect role, which is a big role and a difficult role to play, you have someone that's really specializing and adding a lot of value there, it will.

Not only, I believe, reduce [00:36:00] the total cost of implementation because that role would likely bill at a lower rate per hour than an architecture role. You can have someone who is really dedicated to understanding the business, owning that client side relationship as it relates to BA work, and to really tee up an architect to focus on technical integrity, focus on designing bespoke pieces of work and honing in on that place.

So for me, while someone can absolutely play both roles and does, I think in, in most cases play, play both roles and you need, you still need VA competencies and architects. Absolutely. I think having a dedicated person to support the VA process on a team is hugely valuable.

Vanessa Grant: I'll, I'll throw, and I think business analysis is, you can't be a solution architect without having [00:37:00] business analysis skills.

And while I think you can be maybe a junior admin, that's more kind of billing, you know, You know, completing tickets kind of a thing. I don't think that you can be a solo admin or at least an effective solo admin, or a senior admin without those BA skills. So having the ability to put on that BA hat is super important.

That being said, I don't think it necessarily goes the other way around. I think it's important that you have an understanding of, Have an understanding of Salesforce architecture, but you don't necessarily want to be responsible for those solutions. If you're a business analyst, certainly you want to be able to know where to find information if, if, if you need to go into the system and configure something, but maybe you don't necessarily need to be hands on.

I think particularly at the enterprise level, you know, when you are working on these. Year long plus really complex implementations. [00:38:00] you know, I, I've worked on teams where I was the lead BA and I had four bas that reported to me. And none of us were really hands-on. we were very dedicated to feeding the 30 plus developers that were hungry for user stories.

And so that was where we were able to really focus on business analysis skills. But it's, it, it almost kind of seems like. The smaller, the smaller it is, it's more of a hat. And then the more, the bigger the project and the more complex it is, the more the, the business analyst can kind of stay in their own lane.

Ian Gotts: So that project you just talked about, what was your title? Were you, was the title business analysis? Were you head of business? And what was that title?

Vanessa Grant: I was lead business analyst.

Ian Gotts: Because I think for a lot of people listening, There's a, there's a real question, which is, is a BA role something you should be doing?

Or is it actually a set of skills you should be [00:39:00] gaining on the way to somewhere else? So do we think there actually is a, you could head towards BA as a role? Or do you think it's, you build those skills to become an architect or to become a consultant? Do you think it's an end point?

Vanessa Grant: Based on the, Ecosystem as I see it right now, I don't think that the ecosystem itself is, is looking at business analysts as anything more than kind of an entry level role generally, which is frustrating because I have been on the projects where it's, it's, I'll even say that particular project where I was lead BA and there were four BAs.

I came in a year afterwards and it was already on fire because the project manager on it was like, Oh, the BAs are just supposed to take notes. That's what they do. Right. And so it's, there's so. There's so many misconceptions as to the skill set and, and how, [00:40:00] far into their career and experience to business analyst needs to be in order to be effective.

That it's, while of course, I think it's, I think it's important that we have folks that can, competently take those, those roles. I think it's right now, the salaries, and the jobs out there are not necessarily, In, in favor of like hiring somebody who's an experienced BA that the people aren't seeing the value necessarily in that.

And so I think a lot of folks that maybe want to focus on business analyst skills are moving towards like, okay, I guess I'm going to be a solution architect because that's, that's, that's where the money is. Cause at a certain point, I'm going to, you know, I'll be far along in my career that, You know, being a a solo, a a, a ba, you know, in, in my lane isn't, isn't going to bring in money.

They'll just hire somebody who's, who's more junior because they don't see the value. And it is, it's a constant battle to just educate on, on why it's important to have experienced business analysts on a, on a [00:41:00] project. So it's, I I wouldn't say don't, don't, you know, focus on business analyst skills.

They're obviously critical for all of these roles. but I think, uh. While there are absolutely careers where people can just be BAs forever, I say that it's probably, you're, you're going to cap out on that salary faster than, than if you move on to, let's say a solution architect or product owner track.

Caitlin Graaf: Yeah, it's a, it's a good shot. And I think there's a lot of. Squishiness and role definitions that are related to BA as well. And there's all sorts of different things. There's solutions architects who act primarily as business analysts, there's functional consultants, there's business architects, there's functional solutions, architects, then there's product owners.

There's so many terms that are at play in the ecosystem now, where really the core competencies, I think, are. [00:42:00] strong VA competencies. We're just not really calling them that. I

Ian Gotts: mean, clearly the term business analysis is well understood in the, wider than the ecosystem. I think the ecosystem is actually way behind.

I mean, you think about the Institute of International Business Analytics. I mean, there are, there's certifications out there outside of Salesforce. So maybe Salesforce needs to catch up rather than us trying to reframe what VA is. I think things are going the right direction. You think about size of project.

I mean, the, the, the fact that data cloud requires strong business analysis skills, maybe that will actually force people to go actually understanding the value of business analysis. I mean, I'm going to take us back. one of the core skills, maybe the softer skills is, is helping understand what the value is building that business case.

I mean, I ran one project, I mean, it was a, basically it was Five of us for 12 weeks doing business [00:43:00] process mapping and to build a business case for implementation. So, big piece of work. But the ROI on that was 187, 000. That's what we generated in terms of savings for re engineering. 187, 000. A day. Okay, but we had to go and build that.

I mean there were 20 different things we could have picked on But we picked on a couple of the really big things to build out there So I think that that we've got to work a lot harder on going Okay, if you do this work up front, we can save you a bunch of time It's not just about can I implement salesforce, but can I streamline things?

Can I fix things? um And I think the other way i'm talked about is ai not not ai use will have come into that moment. But if you are going to reengineer your business because you think AI is going to make a difference, d who's going to do that? It's a business analysis role, isn't it? Not just we'll slap a bit of AI on top of a broken process.

And it's called your mess for [00:44:00] less that we need to re engineer. How this works so we can take advantage of that's got to be called be a skills. So I think we've got to try and reframe

this in terms of the benefits that you're going to get out of this for doing strong business analysis. And I think that's probably from everything I'm hearing is probably one of the biggest challenges we've got.

So can I just I mean, we got a few minutes left. Can we talk about just, where we think AI is going to play a role in terms of helping the business analyst? Okay, so This little picture here. I think there's an ai sweet spot and people go ai is going to change the world Yeah, kind of not at the moment.

We're two years in and it still hasn't certainly hasn't taken my job. It's made my job easier There are lots of reasons I use it all the time, but it's not taking my job I think the problem is that the sweet spot which is is there a return on investment? Is it achievable if I need 10 gigabytes of perfectly clean data?

Yeah, that's not going to happen But also do I trust the results enough? You [00:45:00] And I think what's interesting in the BA world, if we think of AI as their really helpful intern, I think there are actually lots of places it can help us. It's good at writing documentation, it's good at words, and that's kind of what BAs deliver, it's words and diagrams.

So it feels like, I can actually help the business analyst more than probably anyone, anyone else in the organization. It's not going to be building solutions for us that are going to be that we trust of a level of detail, but it probably could write user stories really well. It could draw diagrams really well.

So again, from your experience, what are some practical uses of AI that you're seeing as a business analyst? What's helping?

Vanessa Grant: my experience with AI. I guess my my thoughts are one. The transcription tools are the easiest part of, of, of making my job easier using, using AI, just that you can take a transcription.

[00:46:00] it, it puts together action, no, you know, items who's, who said, who said what? I mean, so helpful. I don't have to just go back into recordings all the time. I can just find this, the spots that I need. and then. Being able to get to gleam insights from those transcriptions using AI, even to the point of, you know, helping write documentation or write user stories or start getting together the step by step of a business process, I think, is where AI has been super helpful, as well as, Kind of rounding out the language that I use, because sometimes you're writing so much as a business analyst, it's really helpful to have that, that assistant there, that's going to make you sound, you know, consistent.

And as long as you're, you're getting your points across, across, you don't want AI to do the, the work or it's not going to have all the knowledge, but if you understand the points that you want to hit, it'll, it'll, Make you sound more consistent, especially when you were very tired late in the night, writing [00:47:00] your thousandth user story.



Caitlin Graaf: Yeah, I'd agree with that. This is not something that I have played with as much as I would like to yet, but I'm very curious to see where it goes over the next few years. I think the, the main thing that I would love to use AI more is. Four is, and I know this is functionality that elements has been working on is being able to really put together first draft version one, not end of the line user stories and, and, business process diagrams, and really just shrink the time to just getting something down on paper as a starting point that then as a business analyst, instead of spending So much time drafting new documentation every time that you can really focus your time on critically [00:48:00] analyzing things and making sure that it is really, truly trustworthy and reflective of the business.

And I hope that that is where we're moving towards. I think then it. Would be an immensely time saving and value adding tool. But I think the salient point for now for most business analysts is use it for what it's good for now, but we have to put the layer of quality assurance over, over the top.

Ian Gotts: Someone said that AI is not going to replace you, but someone who understands how AI will. So I think it's, it's, it's, it's having. I like a super efficient intern. I always call it an 18 year old male intern. So. Never in doubt, not necessarily right. But, but also, tireless. Okay, if you say, no, have another go, it doesn't go, oh, really?

No, it just has another go. So, I think part of it is also we need to get good at understanding how to brief or [00:49:00] delegate that work. And then we need to understand how to validate whether the work was any good. And then maybe course correct in terms of how we then do the briefing. And I think we're still learning how to do that.

We're still learning how to go and delegate the work off to someone who is, or someone like say AI, but something that is actually pretty efficient, but not necessarily very accurate. And therefore you need to guide that.

Vanessa Grant: Business analysts bring in that human element. And I think at the end of the day, when you're in front of a person, having that empathy is something that you're not going to get out of AI, but AI can be so helpful as far as.

We are having, we are in the age of the really complex multi cloud solutions. And, you know, everybody says it, and anybody who says that they know everything about Salesforce, it's a, it's a lie, well, it's, it's also still challenging when you're a BA and you're like, okay, I've worked on like three out of 10 of these clouds that I have to implement now, plus, you know, these add ons.

And so, [00:50:00] Where AI can help accelerate things, I think, to a certain extent is, okay, how do I craft these questions? What do I need to know about the major features? And almost kind of accelerating the, your knowledge of things so that you can approach things with a clear understanding of what the Salesforce platform can do as a platform, but getting more of those

specifics that you probably are going to need to dig into so that you can do proper business analysis work.

and, yeah. Making sure that your questions are, are also, and that you're having the right conversations so that you're also keeping in mind things like the well architected framework and, and security and, and the things that the millions of things that, you know, you, you want to make sure that you cover when you're, when you're shifting left so that, so that when you, by the time you're building the thing you are to Caitlin's point, building the right thing.

Ian Gotts: One place where we have got 100 percent accurate data is metadata. You may not like the answer, but it is an accurate representation of your org. So the ability to ask AI to go, [00:51:00] like, look at my entire org and, and don't, don't, I'm not asking for an opinion on it. I'm asking you to do some data analysis for me, which is really good.

Go through and tell me whether any of the descriptions are helpful. Go through and tell me which are the most complex fields based on the dependencies. And how long it will take me to go and analyze these things. So I can work out whether it's a three hour, three day, three minute type discussion. We can use AI.

It's very powerful for doing that data analysis. I think what's very interesting in terms of our teams that are doing AI in terms of the labs, we went from the very beginning going, Oh, this is interesting. I wonder if AI could go and do that. And to start with, we went, okay, it's not very good. Maybe we need to give it more information.

We need to give it more context. And we're always limited by the context window. You can't give it that much. What we've discovered now is that we're now [00:52:00] building specific AI models to do tasks. So we've now got a business process mapping. That's AI model, which we have trained. And we're getting to the point where you go, give it, give it some input.

And now not just a diagram, but you can now drill down multiple levels. It will build you out a multi level diagram, take that diagram and write the user stories, different AI model trained on some different things, but we know what a good user story looks like. So in terms of, I think, Caitlin, we're not, we're not two, three years away from this.

We are weeks, months away from starting to get some stuff that's really valuable. And I think. It's not about taking away the BA job. I think what's interesting and with the feedback we're hearing a lot is where were you when the page was blank? It's hard where you're sitting in front of a customer going, there's a blank sheet.

They, they don't know what to get started with. You're then starting something. It's nice to have actually it built out to start with [00:53:00] and then you can both go, Oh, that's wrong. You've got a common enemy, which is AI built it wrong. So you can have a shared. empathetic discussion about why that process is wrong versus you versus you versus the business user about the process.

So I think getting things started is actually really powerful. The second one is if it's drawing these diagrams in a consistent notation, it's improving the quality, not necessarily the, the quality of what it looks like, but the quality of the way it's been built, which means then you're following on in terms of building good following good standards because I is very good at following those standards.

So I think there are some real we'll see as a behave. I think now is the time to start leaning in on this. And understanding, if you think about every part of your job, you should be asking the question, can AI do, help me? Not can it do it, but can it help me? Like capturing requirements, writing business process maps, doing diagrams, writing [00:54:00] user stories, writing acceptance criteria, thinking about impact analysis, every aspect of that, we should be going, okay, how can it help us?

Could it do a better job? If it can't, let's have a discussion with some people about, okay, how are you using it? Every discussion I have with someone, another idea comes out. So I think this is moving so quickly. This is not a time to sit back and go when it's ready. I think it's ready. We just need to, we need to be actually evolving with it to work out how to make it work.

I'm very conscious we're, I could chat to you for the rest of the day, but we've all got busy lives and things to do. Let's just finish this off. There's obviously some resources at the end of the deck. There's some resources there which we'll make available to everybody in the recording. Any final thoughts for anyone who's considering a BA role?

either things that you would go. I wish I'd done that and haven't or thoughts about [00:55:00] how you should approach a new role. So, Vanessa, do you want to go first

Vanessa Grant: for folks that are interested in a business analyst career in salesforce first? Do you want to make sure that you get that admin certification?

You understand the platform. I think that's that's key but then the other thing which you know, I I don't think you'd hear this from trailhead, but you I think it's important also to make sure that, you understand. Agile, you know, that, that you're maybe getting that scrim master certification because to, to the point of we need to educate, you don't want to learn agile from a consultancy that it's like on a very, very rushed project, that's, that's not the way to know.

So if you. Formally and understand foundationally how something is supposed to work. It's a lot easier to pick out dysfunction on these projects and add value and do that education. So, that, that, those are the things that I would recommend. and those skills, those business analysis and, and of course the BA [00:56:00] certification, but those business analysis and agile skills, I think would support you in any one of those roles that we talked about today.

Caitlin Graaf: I can't remember if it was you Ian or Vanessa that said this earlier in the presentation, but it resonated. There's so many different tools available for business analysis,

and I think as a, as a BA, whether that standalone role or you are in a role that Leverages BA skills, just being aware of all of the different tools in your tool belt and building them out is super important, whether that's the soft skills or the technical skills and so forth.

maybe one just. Little phrase. I think that's always stuck with me that I was told many years ago and every year it becomes more and more important to me is faster is not better, better is faster, and I think it's such a perfect way of summing up why business analysis is so important. And Vanessa, you said it [00:57:00] earlier, shifting left that effort so that you don't end up with technical debt and just.

weight in your org that becomes really difficult to manage and really expensive to manage going forward. I think if we can keep that in mind as BAs, as architects, as admins and so forth, that's a really good way to start communicating the value of these skills to clients and other team members as well.

Ian Gotts: Can I add my my two cents is going to come from a different perspective, which is I think we've said that we're all evangelists in this B. A. The business analysis role actually still emerging. I think one of the really important thing is if you have any interest in becoming a business asset, start connecting with other business analysts.

We need to build a movement here. That's why I'm so excited. The fact the two of you are Here, if people want to reach out to you, there's some LinkedIn profiles there, but we need to start build, build that following because I think there are times when you [00:58:00] feel like you're the lone voice. And you need other people to bounce ideas off.

And I think we're a community here. It's a BA community. And I think building that community means that, ultimately we'll all end up with the right answer. We'll end up with, with more valuable careers and actually more fulfilling careers. So, I'm really excited about, about what we're building here and, looking forward to connecting with everyone in the future.

So thank you for joining us. Thank you for everyone for the discussion on the chat. It's been fantastic and We'll see you at the next event