

# How to Thrive as a New Business Analyst

Building Confidence and Credibility for Success

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# Agenda

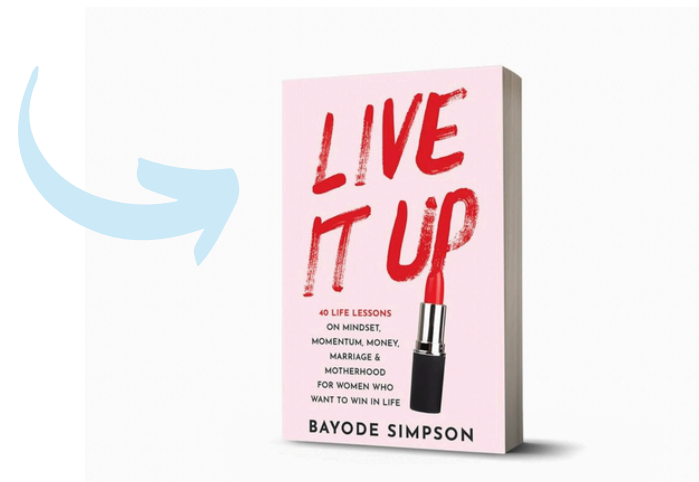
- Introduction
- Understanding Your Role as a Business Analyst
- Building Your Confidence as a New Business Analyst
- Overcoming Impostor Syndrome
- Establishing Credibility in Your Role
- Actionable Steps to Thrive
- Scenario-Based Case Studies
- Sample 30-60-90 Day Plan
- Q & A



# Introduction

Hi! I am Dona (Bayode) Simpson

- Senior BA/Product Owner
- Transitioned from a career in Finance to Business Analysis 12 years ago
- Experience in Tech, Banking, Insurance and Non-Profit organizations
- Career Coach for Women Business Analysts
- President of Women in Business Analysis (WIBA)
- Author: Live It Up



# My Career Journey

- Revenue Accountant
- Senior Revenue Accountant
- Financial Reporting Analyst
- Project Accounting Manager
- 💡 Business Analyst



# Understanding Your Role as a Business Analyst

## Roles and Responsibilities

- Who is a Business Analyst?
- Core Responsibilities
- Key Skills and Competencies



# Understanding Your Role as a Business Analyst

## Common Challenges

- Ambiguous Requirements
- Conflicting Stakeholder Expectations
- Changes in Project Scope and Requirements



# Building Your Confidence as Business Analyst

## Mindset Shift

- Embrace Continuous Learning
- Acknowledge the Value You Bring
- Accept Imperfection and Growth



# Building Your Confidence as Business Analyst

## Identifying Impostor Syndrome

- What it Looks/Feels Like
- Common Triggers
- Recognizing Your Expertise





# Building Your Confidence as Business Analyst

## Strategies to Overcome Impostor Syndrome

- Seek Feedback
- Reflect on Accomplishments
- Adopt a Growth Mindset



# Building Your Confidence as Business Analyst

## Confidence-Building Techniques

- Prepare and Practice
- Seek Mentorship and Peer Support
- Celebrate Small Wins



# Establishing Credibility in Your Role

## Foundations of Credibility

- Expertise: *BA Methodologies & Domain Knowledge*
- Consistency: *Delivering on promises*
- Integrity/Reliability: *Transparency and Honest*



# Establishing Credibility in Your Role

## Communication and Relationship-Building

- Active Listening
- Clarity
- Stakeholder Engagement
- Visibility



# Actionable Steps to Thrive

## Plan for Ongoing Development

- Skills Inventory + Identify Gaps
- Set Development Goals
- Continuous Development Loop



# Actionable Steps to Thrive

## Practical Steps

- Use Templates and Checklists
- Leverage Collaboration Tools
- Engage in Knowledge- Sharing Sessions
- Volunteer When Possible
- Build Your Personal Brand



# Case Study 1

## Missing Requirements

**BA Name:** Priya

### Scenario

As a freshly onboarded Business Analyst, Priya is asked to gather requirements for the implementation of a new billing system.

She quickly realizes the requirements provided by stakeholders are vague, conflicting, and incomplete.

### Key Actions

**Additional Interviews:** Priya schedules short, focused sessions with each stakeholder to pinpoint the root cause of the conflicting requests.

**Requirements Traceability:** She creates a simple traceability matrix to map each requirement back to project goals, identifying gaps and inconsistencies.

**Conflict Resolution Meetings:** Priya brings conflicting stakeholders together for a facilitated meeting to align on priorities, clarifying the scope.

# Case Study 1 Cont.

## Missing Requirements

### Outcome

- Proactivity and Clarity: Priya's thorough approach helps ensure everyone is on the same page, preventing costly rework later.
- Stakeholders learn to value her detailed follow-up summaries, which establish her reliability.

### What Priya Could Have Done Differently

- She could have looped in a senior BA or project manager earlier for support in crafting the interview questions.
- She might have used visual models (process flows or user stories) sooner to clarify the gaps in requirements.

### Question

Have you ever encountered conflicting requirements, and how did you resolve them?



# Case Study 2

## Managing First Stakeholder Meeting

**BA Name:** Marcus

### Scenario

- Marcus is newly hired and must organize his very first stakeholder meeting to discuss a new product feature.
- The stakeholders are seasoned professionals with strong opinions, and he wants to make a positive first impression.

### Key Actions

**Preparation:** Marcus researches the product domain, reviews existing documentation, and creates a brief meeting agenda.

**Collaboration:** Marcus seeks a quick review from his mentor, a senior BA, who provides tips on handling more challenging stakeholders

**Execution:** During the meeting, Marcus actively listens, taking organized notes and clarifying questions as they arise.  
He politely interjects to keep the discussion focused when it strays from the agenda.

# Case Study 2 Cont.

## Managing First Stakeholder Meeting

### Outcome

- **Rising Confidence:** Marcus realizes his preparation paid off, and stakeholders commend his professionalism and efficiency.
- **Early Reputation for Competence:** Prompt, thorough follow-ups demonstrate reliability—Marcus becomes known as a go-to resource for clear communication.

### What Marcus Could Have Done Differently

- He might have conducted a pre-meeting survey to gather early insights or questions from stakeholders, making the discussion even more targeted.
- He could have prepared a simple visual aid (e.g., a process flow or mock-up) to spark stakeholder engagement and clarify concepts.

### Question

Reflect on your first stakeholder meeting.

What's one lesson you wish you had known in advance?

# Case Study 3

## Building Confidence through Iterative Wins

**BA Name:** Ahmed

### Scenario

- Ahmed is a newly hired Business Analyst assigned to his very first project: helping the company implement a Customer Relationship Management (CRM) system.
- He has limited experience with CRM tools but is eager to prove his capabilities and build confidence through small, tangible achievements

### Key Actions

**Pilot Project:** Ahmed identifies a manageable pilot feature—automating lead capture from the company’s website into the CRM.

**Stakeholder Feedback:** After configuring the basic workflow in a sandbox environment, Ahmed holds a short demo for sales and marketing stakeholders to gather immediate feedback. He encourages them to test the feature using real leads, noting pain points or missing fields.

**Iteration and Improvement:** Ahmed refines the workflow based on feedback, adding additional data fields and automating email notifications for new leads. He documents these changes clearly, highlighting the before and after state to illustrate progress.

# Case Study 3 Cont.

## Building Confidence through Iterative Wins

### Outcome

- **Increased Confidence:** Demonstrating a tangible improvement in the lead capture process helps Ahmed feel more capable and recognized.
- **Enhanced Credibility:** Stakeholders see immediate value in his iterative approach, building trust that he can handle larger CRM enhancements.

### What Ahmed Could Have Done Differently

- He might have consulted IT security early on to ensure data privacy and compliance requirements were fully captured from the start.
- He could have set clearer metrics for success (e.g., specific reduction in lead processing time) prior to the pilot, making the value proposition even more concrete.

### Question

When implementing a new tool or process, how have you broken down the project into smaller wins to build momentum?”

# Actionable Steps to Thrive

## 90-Day Plan

- Day 1-30: Observe
- Day 31-60: Contribute
- Day 61-90: Deliver

## 30-60-90 Day Plan

Prepared by: Dona Simpson

Prepared for: Business Analyst – Ada Smith

Date: 1/11/2025

### Days 1-30

#### Overall Goal

At the end of your first 90 days, you should have a solid understanding of the CRM system (D365) and its integration into business processes. You should be proficient in managing tasks using Jira and documenting workflows in Confluence.

At this stage, you should work independently on key deliverables, such as refining workflows, verifying data accuracy within the CRM, and addressing stakeholder requirements. Additionally, contribute to testing and validating CRM configurations, and prepare training materials and demos to guide stakeholders in utilizing the new system effectively.

#### Focus

Learning, Learning and More Learning

# Sample 90-Day Plan

## 30-60-90 Day Plan

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# THANK YOU

Let's keep in touch!



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