cprime
LEARNING

BUSINESS ANALYSIS TRAINING

Case Study
Allscripts Academy

A deep dive into the business analysis training solution that was built and delivered for Allscripts, a global healthcare IT company. Their software development lessons can — and should — be applied to any enterprise SDLC environment.

If you've ever visited the doctor or taken medicine, you were probably only one or two degrees from a healthcare solution designed and sold by Allscripts. If you're in the healthcare sector, you've probably interacted with their products. Starting in 1986 as a medication management company, they've grown into a versatile and diverse healthcare IT solutions company, with more than 7,000 employees and locations across the globe.

Cprime Learning began providing business analysis training to Allscripts on an enterprise program basis in 2012. They are a valued client, but also a special case of how business analysis training can solve enterprise software problems. Why? Because their primary product is software, and they go to market in one of the most complex and highly regulated industries in the world. Therefore, they have faced almost every challenge that any enterprise software development environment is likely to face, and then some. Thus, their experience is a valuable example to any large organization who develops software...whether as a product line or for internal use.

To build the case study, we had conversations with a number of people who played different important roles at Allscripts, from team leaders and business managers to the practicing business analysts on the ground. Watch the video or explore specifics below.

Allscripts Academy

THE CLIENT:

Allscripts

HIGHLIGHTED RESULTS:

- Organizational process assessment
- Team and individual skills assessment
- Curriculum design
- Enterprise team training
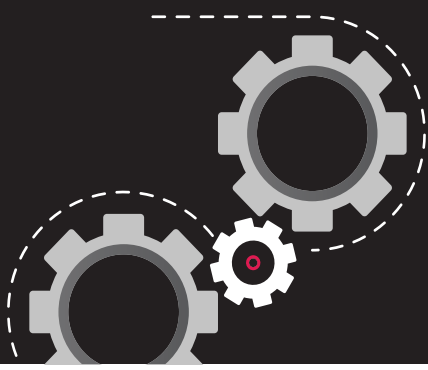- Certification training and coaching

EXECUTIVE SUMMARY

The original Allscripts situation confronted two key strategic problems most enterprises face: First, software development challenges, which come in many forms. Allscripts had very smart project teams, but much of their methodology wasn't consistent. They had numerous process and model challenges. There were communication inefficiencies, both with offshore departments and internally. There were time lags that resulted from these issues and a number of others.

Second, Allscripts faced job role challenges. Again, despite having the human capability and a wealth of project assets available across the enterprise, the processes were not always in alignment. The many departments and roles weren't always speaking the same language, or using the same methods.

Allscripts knew they needed to improve their business analysis practice, but even pinpointing the specific needs proved challenging. We provided experienced experts who could walk through an organizational analysis, and help determine how to most efficiently deliver the skills and process improvement that were necessary to for their BA teams to begin operating as a world-class software product development operation.

They are a wonderful example of how the internal workings of an enterprise can be oiled and improved by SDLC training. The real beauty of enterprise training is the overall competitive advantage that opens up when you solve SDLC challenges. When projects get done faster, with fewer errors and more usability, it does more than just move the needle. The real win comes from the possibilities. Sure, you're paying to solve an immediate need – skills gaps. But, as Allscripts demonstrates, the true business value of trained project teams is human capital that is more engaged, more successful, more creative, and more motivated. They can succeed at their jobs: not only the key to the enterprise's success, but also the most important factor in their job satisfaction and career path. Along the way, the business will discover new product possibilities, new operational efficiencies, and tap into new deposits of enterprise value.

ALLSCRIPTS BA ACADEMY: A LEADERSHIP PERSPECTIVE

Debbie Stolper is a Senior Manager for the UX team on Allscripts' HomeCare Solutions. We talked with her about the value of business analysis program training from a team leader's point of view.

Debbie has been at Allscripts for almost five years. As a leader of the Homecare Development team, her group designs products for Allscripts' industry-leading home care systems. This product line is designed to improve clinical quality of care, financial performance, and operational control for both large, integrated home care organizations and small home care companies alike. The team's products provide business, clinical, and scheduling functionality for multiple lines of business—home health, hospice, and private duty are combined seamlessly in one integrated home care software system. Other priorities include interoperability, exchanging real-time data with state HIEs, and meeting health information exchange industry standards.

Team leaders and the value of training

Debbie has been very pleased with Allscripts' commitment to training, and she told us a little about her experience with the Allscripts "BA Academy" and how it worked for her team.

She leads 8 business analysts and technical writers — their job is designing user experience for a range of homecare product customers. When she first began, she thought she was being brought on board to manage "product designers." While they do design products, she soon found that she actually led a team of business analysts. At this time, Allscripts was in the process of piloting a BA training program. During the pilot, a small number of team members from across the organization are invited to participate, and the enterprise "tries out" the training to see if it's a good fit and will add value to the enterprise.

Debbie approved one of her team members to attend the pilot, and she returned from the training with a great deal of positive feedback. She emphasized how relevant the training experience was to her own job, and how it would apply to her daily work. By this time other areas of Allscripts' BA workforce were experiencing the same positive feedback from the pilot program, and the enterprise began organizing their BA teams into cohorts who could move through the training program according to the schedule and curriculum plans organized by Cprime Learning and Allscripts. Debbie approved training for some of the other members of her team, and they also came back with great feedback.

Debbie and fellow team leaders began the process of training entire project teams. One of the things she liked most about the experience was the fact that the training was not just a one-time class held at a public location. The

training was designed for Allscripts and delivered at Allscripts. It was a series of classes over a period of time that allowed colleagues who held similar roles at the company but didn't know each other to go through training together. They came out speaking a common language, solving the same kinds of problems, and leveraging common skill sets learned in class.

Debbie eventually attended the training herself. Allscripts is an Agile shop, and one of her primary concerns was making sure the training and skills that BAs learned were compatible with the Agile framework they used to develop software products. She was pleased to find that they were – business analysis tools like estimation and prioritization weren't only compatible with Agile...they strengthened and reinforced the Agile development environment in which they worked.

When Debbie evaluates her teams, she looks at results. Although she readily agreed that metrics and data are important, she said that the true value of good BA skills is obvious in the daily work. The training gave her team specific tools for correctly prioritizing tasks and analyzing needs. She stresses that ultimately these translate into measurable long-term results, but in many ways it's the short term reward of seeing an instant boost in competency and productivity that is most exciting to the manager of a team.

How BA training improves daily work

In terms of daily work, Debbie's team focuses on product deliverables. The Homecare team develops software and tools that will be used by home care and home health agencies. These users include financial customers, clinical customers (ie PTs, OTs) and network administrators. With such a range of end users, there are many examples of critical daily work activities that were addressed by the training. These tasks combine to define the success of the overall product line. For instance, the home care development team performs research and works with a solutions manager to define needs for the product line. They spend time decomposing and analyzing specific product needs within the department, but they also work closely with customers to make sure the final product dovetails with the practical requirements of the end users. From there, they have a release schedule they follow, and they generate user stories to clarify both project requirements and the daily workflow.

Because the people on Debbie's team have to work together to deliver one common product, it is critical that they have a shared experience and a shared language they can use to perform their daily work and talk about what they are doing. One of the key benefits of the training experience is this common playbook. Debbie's team members continue to train with us. She believes their skill set as a whole is enhanced and strengthened. With every training session, this "unification" grows stronger, allowing the team to function as an increasingly tight, synchronized unit. This has allowed speed to market and defect rate to be dramatically improved.

There were some very specific tools within the Home Care product line that Debbie says benefited her team right away:

- Knowing how to ask the correct questions
- Learning how to elicit information from stakeholders indirectly
- Leaving with a common "language" and a unified playbook for business analysis techniques across the enterprise – even across departments that were previously siloed
- Knowing how to confront and analyze tough factors that influence decisions
- Mingling with other business analysts in the company, allowing faster communication, higher levels of trust, and much more efficient activities even across departments that didn't previously work together.

Debbie's team works very closely with the technical teams that develop Allscripts' Homecare products. The ability to improve their skill set as BAs has allowed them to better provide appropriate information for both software developers and the QA teams.

Parting advice for companies who need training

We asked Debbie what advice she would give to an organization who are seeking business analyst training or who are struggling with their BA practice. Her top recommendations were to carefully review course outlines and take a good look at the CVs of instructors. Because the human expert standing in front of the class is ultimately the vehicle for learning new expertise, it's the subject matter expert who is the most critical link in the training experience. And when that experience and expertise gets transferred to a working team, the building blocks of the enterprise as a whole are solid.
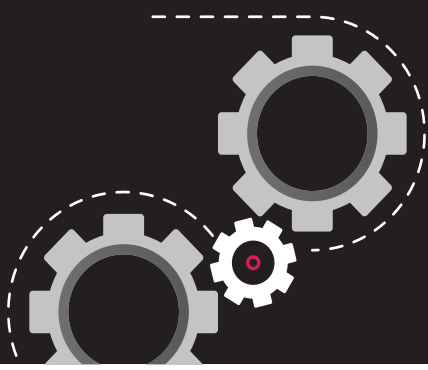
ALLSCRIPTS BA ACADEMY: A CLINICAL PERSPECTIVE

Donna Hayes is a Clinical Business Analyst with Allscripts. She brings a healthcare background and clinical experience to the software development processes at Allscripts, but she was new to business analysis. She spoke with us about the importance of the training program to a new BA.

Donna's background is in nursing and clinical work. She was hired by Allscripts to provide subject matter expertise as a business analyst for software products that would ultimately be purchased and used by healthcare professionals. By onboarding specialized BA staff members such as Donna, Allscripts can truly identify and respond to the unique needs of their healthcare client base. She brings a vital clinical component to Allscripts' product design process.

Business Analysis at Allscripts: The Clinical Component

As she helps design how products work for the clinical user, she also has a responsibility to patient safety in feature design and product release. She writes user stories and runs sprints for the implementation teams on the back end of the Allscripts delivery process. The marriage of Donna's healthcare background with a software development environment is the type of combination that allows Allscripts to market products in the mission-critical and highly technical world of healthcare.

However, although her clinical background was invaluable, when she first started she was completely new to the world of business analysis as a profession. She was a perfect candidate to attend the Allscripts BA Academy.

According to Donna, attending the classes allowed her to understand the language of business analysis from the perspective of a BA professional, rather than strictly as a nurse or a clinical practitioner. She describes how helpful it was to simply learn the vocabulary and processes of a business analyst. The technical language of her healthcare background differed completely from the standardized language of a BA working on a software team. Attending a structured series of BA classes quickly allowed her to get up to speed on the language of a BA, and therefore become a "translator" between clinical needs and software feature design.

The Training Experience

Donna describes the training courses as "information intensive." The program required effort and a certain time commitment, but Allscripts' dedication to developing employee skills and the leap in her capability made it worth it. She can now keep new development measurable and testable, with standardized processes and expectations. She learned to model present state and future state, and how to specifically define the "how and why" of feature design and deliverables.

Despite the challenge, Donna said the training experience was fun. She was impressed with the way the classes worked as a series, building a complete professional skill set which all tied together at the end of the training program.

We asked Donna to name some specific responsibilities the courses helped bring method to on a daily basis. Her key picks revolved around communication and stakeholder identification. Specifically, she told us she gained great deal of value from:

- Learning to correctly identify key stakeholders
- Writing appropriate goals for end users
- Isolating specifics of system behavior
- Eliciting detailed, well-defined requirements
- Using tangible methods for connecting feature design, code building, and QA

As Donna became better versed in business analysis tools and techniques, she began to identify parallels between her clinical background and the BA profession. For instance, healthcare practitioners know that workflow is a critical issue. A veteran business analyst will say the same thing. Teams have to keep things moving appropriately, and their final products have to function in a way that allows efficient, correct workflow in the end use environment as well.

As simple as an insight like this may seem, it demonstrates perfectly how valuable the training experience is for a BA like Donna who performs business analysis work in a sophisticated field. Learning standardized techniques for connecting dots, from laying the groundwork for a project with regulatory research and stakeholder identification, to
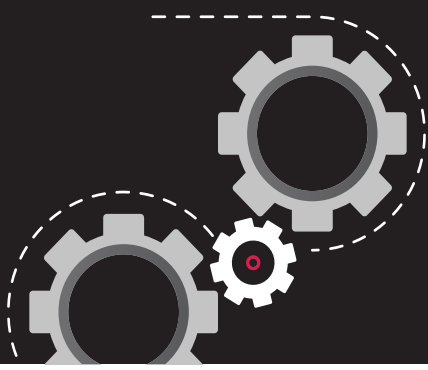
executing in a way that seamlessly ports design over to the software development and QA team, is the heart of a BA training program. Donna used the example of redesigning a prescription process. Where does the physician enter the process? Where does the patient enter the process? Where does product enter the process? An expert set of BA tools allows a solution to be accurately mapped.

Tying it All Together

Donna left us with one final valuable observation. As new as she was to the BA role when she began training, she described how there were seasoned business analysts working in the field for 15 or 20 years who took away just as much value from the training as she did. Despite smart teams and a wealth of experience, Allscripts had a variety of procedures and vocabularies being used. It was the teaching of a uniform, consistent, and fully updated BA body of knowledge that synchronized teams across the enterprise and dramatically improved the quality and time to market of the Allscripts' products built by Donna and her teams. This is the experience of a huge percentage of the BA teams. The technology is there, and so are the processes. It's getting your people in step with them and with each other that unlocks both daily and strategic advantage.

ALLSCRIPTS BA ACADEMY: A CROSS-FUNCTIONAL BA PERSPECTIVE

Jose Biggiotorres is an expert Business Analyst working on multiple initiatives at Allscripts. He lends his expertise to different departments, and specializes in financial issues. We spoke to him about the importance of well-trained business analysts in an enterprise environment.

When we spoke with Jose, he was just finishing up tenure as an expert BA in charge of the financial side of Allscripts' Homecare solutions product line. He dealt with the accounting side of analysis on products, as well as many aspects of statistical analysis and data. He was preparing to transition to a product line at Allscripts dealing exclusively with finance and accounting related healthcare products.

Overcoming Professional and Enterprise Obstacles

Despite being a business analyst for many years, Jose had never received formal BA training. In fact, like many of the business analysts, it was only recently that they even began calling their work "business analysis." They had been called product developers, or data analysts, or user experience designers. Of course, all these roles are encompassed by the BA profession, and they all have a common body of knowledge to draw from in performing the wider role of a BA.

One of the major obstacles Jose faced on a daily basis was the fact that the offshore software engineers he worked with simply did not understand the healthcare landscape in the United States. Therefore, they could not really visualize the end user of Allscripts' products. The BA training gave Jose hard techniques for developing end user personas and ways to communicate holistic user needs that could transcend even the cultural and distance barriers of his different business units.

Jose described another pain point encountered by his teams on a past project before the BA Academy: the need to chart additional business processes and documentation toward the end of projects. This need added dramatically to the communication burden of the teams, just when they needed to be able to focus on really pushing toward the conclusion of the project. Jose told us he learned a variety of tools and techniques during the BA Academy that would have allowed them to take care of much of this closer to the beginning, which would have yielded obvious quality and delivery speed advantages.

Process Skills and People Skills

Even though improvements in these results can be quantified – i.e. time reduced to delivery, defect rate reductions, or revenue increases tied to a product line – Jose told us that many of the tools used to achieve them have more to do with people than numbers. There are certainly a host of business analysis tools that are very analytical...charts, decomposition techniques, modeling, etc. But of equal importance are the tools that help integrate the members of a team with the processes used to build the project – like building the personas Jose described. If Allscripts can appropriately understand their users, they can understand their customers. However, those insights don't get carried over to the software development teams without proper business analysis methods. The training gave Jose and his team tools for connecting factors like end user demographics and technology skill level to the developers working with the code. As with many of the BAs we speak to, user story techniques played a critical role. Furthermore, simply having uniform methods for defining those user stories, for diagramming and modeling both personas and processes, can be transformative. Jose told us that beginning to use these tools has made a big difference to everyone on the team understanding their jobs – not just as individuals, but as a unified team.

The "Virtual Training" Experience for Remote Teams

Jose was an important training customer because he was part of a group that attended the "virtual" classes. At the time of his training, he worked in the Ukraine, where Allscripts had a number of development teams. As part of the enterprise training solution we delivered, it was important to train both the remote BA staff as well as the in-person classroom training delivered at Allscripts headquarters.

Just as many customers are, Jose was skeptical at first about attending training in a virtual environment which relies so heavily upon peer interaction and group exercises. But he told us that by the end of his first class, he was a believer. He told us that the customized Webex classroom environment did not hamper his ability to get to know colleagues, to exchange ideas and practices, and to collaborate on group work as they got to know each other. He interacted and formed relationships with Allscripts colleagues he had never met. In Jose's words, "You would think you want to do this type of training in person. But the way it was handled and presented, it was as if we were in the same room. The experience was fantastic." In fact, despite beginning as a skeptic, Jose was very specific about that fact that he would like his future training to be virtual as well.
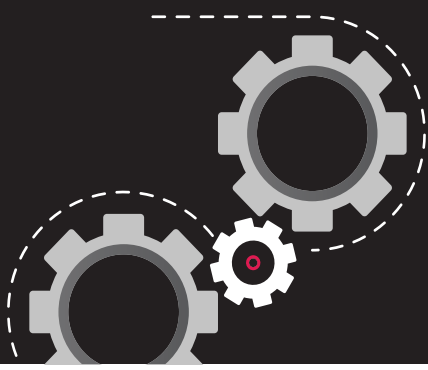
Strategic Benefit and Proficient Enterprise BA Teams

The last point Jose left us with was less about any specific expertise taught in class, and more about the strategic value of this type of training to the enterprise. Training like this is not necessarily cheap, but his perspective echoed several of his colleagues:

"You need to invest in your human assets and have them grow in order to achieve your business goals. How many times have we heard that [a product team] was not able to finish by the date that we wanted to announce, so we're going to have to extend it?

Well, the BAs are doing a good job. The project starts with the BA work. But if we do not have the tools to be able to achieve that design in a timely fashion and in a way that everybody will understand, then the business goal is not going to be achieved. So, you may have a group of BAs that are doing a fantastic job, but are they doing it to the level that the business needs? The investment in time and money to be able to bring that group of BAs to that next level is the best investment a company can make to ensure the company's goals are met. If you do not, sales might not be as high. Client satisfaction may not be as good."

It would be difficult to sum it up much better. In Jose's case, he is an expert business analyst traveling across project environments and locations. His job role contributes to multiple product lines according to need. Those contributions are closely tied to product success and profitability.

ALLSCRIPTS BA ACADEMY: DAILY BUSINESS ANALYSIS

Ken Burney is a Senior Business Analyst for Allscripts' EHR Solutions product line. He spoke with us about the value of the training program as someone who has to deliver functional, marketable software on a regular basis.

Ken has been with Allscripts for 6 years as a business analyst, and was recently promoted to Senior BA after attending the Allscripts BA Academy. He performs business analysis for Allscripts' Electronic Healthcare Record (EHR) product line – specifically systems dealing with immunization registries, patient portals, and Syndromic Surveillance (SS). The major focus of their current release is on meaningful use, compliance, and ensuring value and compliance for the customers of Allscripts. Rapidly changing government regulations and technology shifts have given rise to a host of challenges for their clients. Allscripts has to make sure these challenges are addressed in their products. If not, unsatisfied clients are just the beginning: clients may inadvertently break the law, or be ineligible for payment by the government for their work. It's a significant area of need for their customers, and Ken is on the front line of providing solutions.

The BA's job at Allscripts: Building Healthcare Solutions

He spends a lot of time researching government regulations and requirements around healthcare. He spends time with clients, hearing about their ideas and needs, and figuring out what is necessary, what's necessary to meet government requirements, and what are meaningful use features.

Ken gave a few specific examples of skills he learned during the classes that he uses on a daily basis: he has gotten much better at user stories since training. There were a lot of things that seemed simple on the surface, but they really do make a big difference to the end result in terms of clarifying requirements and expectations. The training also taught him techniques to ask better questions. He keeps a quick reference guide at his desk to keep him from slipping back into less effective methods of requirements elicitation, and every time he begins to write, he makes sure his questions meet the standards taught in class. This improvement has allowed a deeper dive into client needs, brought more clarity to what clients REALLY need by focusing on finding the root issues during the client conversation. No matter how eloquently customers frame their answers, ferreting out the real needs can be a challenge. Therefore, on a daily basis, Ken's most valuable takeaways from training were the questioning techniques. Different ways to ask questions and consistent writing techniques when formulating questions are examples of skills Ken now uses every day.

The BA as Communicator

A lot of the BA's job revolves around communication. We asked Ken to provide specific examples of communication challenges the Allscripts teams faced when working with technical teams. He explained that the BA is a liaison between the business customers and the technical resources behind the product (developers, testers, offshore resources etc.) They often faced situations in which terminology or industry jargon meant one thing to the customer, but something else entirely to the technical team. So even in cases when the same language was being used, expectations were not met because perceived meanings of the language were different. There were many examples of situations in which the development team spent time building products that fit their understanding of requirements as defined, but the customer was expecting something completely different. Learning correct BA questioning techniques, consistent language and processes, and tools for identifying the real needs behind the language of others have been valuable aids in his job.

Ken had taken some business training in the past, but the key difference was that his company sent him to public classes where he received instruction with a lot of strangers. Having the training brought to Allscripts, delivered to all their own teams, lent an "institutional equity" to the experience that has been very valuable.

Although Ken is a practicing BA on an Allscripts team and mostly uses daily techniques he learned in class, he also has something to say about BA training from the company's leadership perspective. "If your BAs are very efficient, you're going to spend a lot less time and money developing your product. You'll develop it more efficiently, more accurately, and sometimes as a more useful product. And, you can get it to market fairly quickly. I would think that this training would improve the quality of work, speed to market, and hopefully more market share and ultimately more money."

The Training Experience

Ken has not yet pursued a BA certification, but he's beginning to consider it. Besides the confidence and career benefit of holding a credential, he discussed the fact that certification for the BA is sometimes of greatest value to the leadership, because managers and leaders higher in the company may not understand the granular work performed by BA teams below them, but if those teams hold industry-standard credentials it provides assurance and confidence in the capabilities of their staff.

Ken enjoyed the training he took. He had three different instructors throughout the program. He told us the experience was engaging, and the instructors always seemed to have a lot of real-world experience on the topics they addressed. He was one of the first BAs to take the classes, and immediately after he took the training, he felt the experience would be valuable both for other BAs at Allscripts, as well as for the organization as a whole. The prospect of a thoroughly trained staff of BAs seemed obvious – whether soliciting requirements, improving communication, or simply getting on the same page with terminology and BA techniques within the company.

As other BA teams in the company continued to get trained, Ken was preparing for his upcoming software release. Two weeks after we interviewed Ken, his teams were going into code freeze and preparing to finalize the project. There were a lot of new features included, and a lot of complexity to manage. Fortunately, Ken and his colleagues were...and are...well-equipped to bring the final product to market.

ABOUT CPRIME

Cprime Learning is the training and certification division of Cprime.

An Alten Company, Cprime is a global consulting firm helping transforming businesses get in sync. Cprime is the partner of choice for Fortune 100 companies looking to achieve value and agility. We help visionary business leaders compose solutions, execute implementations, and exceed against business goals. With our key partnership recognitions, including Atlassian Platinum, AWS Advanced, and SAFe Gold SPCT partner, our industry-leading software and services work in synergy to deliver transformations.