Clariteq Workshops for Business Analysts

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Overview:

Business Process Modelling and Business Data Modelling, especially Concept Modelling, are fundamental techniques for improving business operations and the information systems that support them. Each technique is powerful on its own, but they are even more effective when applied in a synergistic way. This unique workshop, created for Booking.com, provides proven techniques for process and data modelling, and specific methods for integrating them. It incorporates core content from Clariteq's "Working With Business Processes" and "Business-Oriented Data Modelling" workshops, which consistently receive "excellent" ratings. Everything covered in this practical, three-day workshop is based on over 40 years of successful consulting experience at major enterprises around the globe.

Rationale / Benefits:

Business Process Modelling:

Processes are how an enterprise delivers value, internally and externally, so process models that clarify *what* those processes are, *what* they deliver, *who* is involved, and *how* they operate are absolutely essential to understanding as-is issues and determining to-be improvements. Participants will learn five fundamentals about successful business process work, beginning with "what actually *is* a business process?" With this foundation and hands-on examples, we will learn how to discover an enterprise's real business processes, specify process scope and stakeholder issues and goals, model process activities and workflow, assess the process, and design an implementable and sustainable process.

Concept Modelling:

Data modelling has often been seen as a technical exercise, but there is now a worldwide resurgence of interest because it is essential to other initiatives such as business process change, requirements specification, Agile development, and even big data, analytics, data lake implementation, and AI. Why? – because it ensures a common understanding of the things – the entities or business objects – that processes, applications, and analytics deal with. This workshop introduces concept modelling from a non-technical perspective, provides tips and guidelines for the analyst, and explores entity-relationship modelling at conceptual and logical levels using techniques that maximise client involvement.

Overall:

Instead of textbook theory about what *should* work or what *might* work, this workshop covers what *really* works. You'll get clear methods, templates, guidelines, and tips to help you get quality results and maximise the involvement of business subject matter experts. That's because this workshop was developed by practitioners, for practitioners. The techniques have been developed, refined, and proven over years of real-world project experience. They've been used to support in-house development, offshore development, and package selection and implementation. They've even been popular with Agile teams, because they support "just enough" modelling to get into the ballpark and then let iterative development take over.

Target Audience:

Business Analysts, Solution Architects, Application Developers, Project / Programme Managers, Business Managers, and Subject Matter Experts responsible for the analysis, design, and development or selection and configuration of an application. Business Intelligence (BI) professionals, Big Data specialists, Data Scientists, Data Lake implementers, Data Engineers, AI Solution Architects, and others are all currently benefitting from the methods covered in this workshop.

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Course Outline:

Requirements definition – goals, issues, and the return of model-driven techniques
* Process fundamentals – concepts, terminology, principles, and techniques
* Concept modelling – creating a common language and "world view" (Conceptual Data Modelling)
* Process workflow modelling and design – understanding the as-is and moving to the to-be
* Process-data connection – data modelling and process modelling working synergistically

Course Topics:

Requirements definition – goals, issues, approaches, and a proven, model-based framework
1. Case Study – a three-phase, step-by-step method for developing a concept model with maximum business involvement
2. Case Study continued – how the concept model was essential in understanding business processes and quickly discovering application requirements (use cases and services/capabilities)
3. A proven, model-based framework useful to businesspeople, business analysts, and developers
4. Making sense of contextual (scope,) conceptual (overview,) and detail (specification) modelling
5. Why these techniques are being embraced by the Agile community and even AI practitioners

Business Process fundamentals – concepts, discovery, scoping, assessment, and goal-setting
1. The factors that really matter – five things you need to know about business processes
2. Why people are confused about "what is a business process""
3. An Agile approach – a three-phase methodology for a process-oriented project
4. Discovering your organisation's processes – a surprising bottom-up approach
5. Developing a Process Scope Model – clarifying boundaries, contents, and purpose
6. Answering "Why?" – initial assessment of the "as-is" and goal-setting for the "to-be"
7. Adding detail in a controlled fashion – building an Augmented Scope Model

Concept Modelling fundamentals: terms, components, types of models, and a three-phase approach
1. The three main components of a Data Model – guidelines for entities, relationships, and attributes
2. Three common errors in identifying entities, and how to avoid them
3. Eliminating confusion and missed requirements with well-structured definitions and assertions
4. How tools such as Gen AI can *augment* concept modelling, but not *replace* human involvement.
5. A simple guide to normalisation – an intuitive approach for the conceptual to logical transition
6. The four most common patterns in data modelling, and rules and guidelines for applying them
7. Conventions for comprehension – how to draw your data model diagram for maximum readability
8. The "Four Ds Of Data Modelling" – fundamentals you must never forget

Business Process workflow modelling and design
1. Components of a Process Workflow Model / Swimlane Diagram
2. Why swimlane diagrams became the standard, and five guideline to ensure you use them well
3. "Flow first, detail later" – ensuring your flow models are useful and tell a story
4. Modelling the as-is process – facilitating a workflow modelling ("process mapping") session
5. Controlling detail – two levels of workflow model, and when to stop modelling
6. Enabler-based assessment of the as-is process – a framework for assessment and redesign
7. A feature-based approach to design – generating creative improvements and assessing them
8. Designing a sustainable new process design – a phased, step-by-step method
9. How focussing on "what first, who and how later" helps us identify the best technology for a process step – Agentic AI? RPA? (Robotic Process Automation,) a traditional application, ...?

The Process-Data connection – synergies between process and data modelling
1. Some reasons why many "process people" and "data people" don't work together
2. Why Process and Data Models, especially "essential models," inherently support each other
3. Examples of process-data synergies in modelling and analysis
4. Examples of process-data synergies in implementing packaged software

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Alec Sharp, a senior consultant with Clariteq Systems Consulting, has deep expertise in a rare combination of fields – *process modelling, analysis, and redesign*; *business-oriented data modelling;* and *business analysis and requirements specification*. Increasingly, his work involves *facilitation* and *organisational change*. His 40+ years of hands-on consulting experience, practical approaches, and global reputation in model-driven methods have made him a sought-after resource around the world.

He is also a popular conference speaker, mixing content and insight with irreverence and humour. Among his many top-rated presentations are "Days not Weeks or Months – *Process Change in Agile Timeframes*," The Human Side of Data Modelling – *Communicating With Stakeholders and Other Mere Mortals*, "Analyst or Stenographer? – *Myths, Half-truths, and Successful Methods in Business Analysis*," "The Multi-Skilled Influencer – *Becoming a T-Shaped Professional*," and "Agile and Modelling – *What Works, What Doesn't*." His 90-minute briefing "*Five Things You Need To Know About Business Processes*" has been delivered to senior executives at major organisations around the globe

Alec literally wrote the book on business process modelling, "Workflow Modelling: Tools for Process Improvement and Application Development." Popular with process improvement specialists, business analysts, consultants, and business professionals, it is consistently a top-selling title on business process modelling, analysis, and design, and is widely used as an MBA textbook. He was awarded DAMA's Professional Achievement Award, a global award given to one professional a year for contributions to the Data Management profession.

Alec's popular workshops "Working With Business Processes," "Working With Business Processes Masterclass," "Business-Oriented Data Modelling," "Business-Oriented Data Modelling Masterclass," "Requirements Modelling," and "Model-Driven Business Analysis Techniques" are conducted around the globe, both in-person and virtually, at many of the world's best-known organisations. His classes are practical and energetic, consistently earning "excellent" ratings.