

Eleven recent presentations by Alec Sharp, Clariteq

Note: these have all been delivered, both in-person and remotely, as 3.5 hour seminars, including breaks. They have also been delivered as 2 hour, 90 minute, and even 50-60 minute sessions. All of them have been rated “best session of the conference” at least once, and some of them several times. Contact us for fees and availability.

Concept Modelling – *An Angst-Free Framework for Engaging your Executives*

We have all heard “This is the golden age of data” and “Data is the new oil” but that does not necessarily mean your senior executives are anxious to participate in Conceptual Data Modelling / Concept Modelling. The speaker recently had an interesting exception to the reluctance of senior executives to participate in data modelling. Led by the Chief Strategy Officer, a group of C-level executives and other senior leaders at a mid-size financial institution asked Alec to facilitate three days of Concept Modelling sessions.

Fundamentally, a Concept Model is all about improving communication among various stakeholders, but the communication often gets lost – in the clouds, in the weeds, or somewhere off to the side. This is bad enough in any modelling session but is completely unacceptable when working at the C-level. Drawing on forty years of successful consulting and modelling experience, this presentation will illustrate core techniques and necessary behaviors to keep even your senior executives involved and engaged,

Key points in the presentation include:

- What got the executives interested in the first place.
- How we prepared for and structured the sessions.
- How we communicated with the executives before, during, and after the sessions.
- An angst-free framework for developing definitions.
- How the Concept Model evolved, and the crucial findings.
- The executives’ reaction during the retrospective.

One-sentence description:

How we engaged a group of senior executives at a financial services firm, at their request, in preparing for and developing a robust Concept Model over three days of facilitated sessions.

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**Concept Modelling for Business Analysts –
*Making Data Modelling a Vital Technique***

Whether you call it concept modelling, conceptual data modelling, domain modelling, business object modelling, or something else, the technique is seeing an amazing resurgence. Business Analysts worldwide are realizing that it is a powerful addition to the BA toolkit. The key is to see that a concept model is a description of a business, not a technical description of a database schema.

Based on over 40 years of experience, on projects of every type and size, this presentation provides practical techniques for a business-friendly approach to data modelling, and proven approaches for using it as a foundation for business analysis. Repeatable methods and patterns will be emphasised, and many real-world examples will be shared. Topics include:

- The essence of concept modelling and essential guidelines for avoiding common pitfalls
- Methods for engaging our business clients in conceptual data modelling without them realizing it
- Critical distinctions among conceptual, logical, and physical models
- Using concept models to discover use cases, business events, and other requirements
- Using the technique in package implementations, process change, and Agile development

One-sentence description

Concept Modelling (or Conceptual Data Modelling) has seen an amazing resurgence of popularity in recent years, and Alec illustrates the many reasons for this along with practical techniques and guidelines to ensure useful models and business engagement.

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**Business Processes: What You Really Need to Know –
*Fundamentals & Techniques***

Recent years have seen a huge resurgence of interest in everything to do with business processes. Unlike the faddish Business Process Reengineering craze in the early 1990s, current efforts are much more pragmatic. Driven by needs ranging from improved organisational responsiveness to regulatory compliance, public and private organisations worldwide are committing to a more “process-oriented” approach.

The results, however, often fail to live up to expectations, so the session will highlight the most common problems, and specific techniques to avoid them. Key points include:

- What a "business process" really is, and what goes wrong if they are identified improperly.
- The cross-functional minefield, and the surprising issues that must be addressed.
- The critical relationship between business processes and large system implementations.
- Taking a holistic view of processes – factors that are under- and over- emphasised.
- Differentiators – why you must decide what a process has to excel at.

We'll also look at some simple but highly effective methods for documenting and optimising processes. Throughout, the key points will be illustrated with real-life examples, and time will be available for discussion.

One-sentence description

Business Process Change efforts, especially transformative change, often fail for a few simple reasons this presentation explores – and offers solutions for!

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**Requirements Modelling with Use Cases, User Stories, & Services –
Avoiding the “Useless Case” Phenomenon**

Business Analysts around the globe are returning to robust but practical modelling techniques because of dissatisfaction with list-based (“the system shall...” or “the system must...”) methods. Among these modelling techniques are Use Cases and User Stories, which get a lot of attention but often fail to live up to expectations

This workshop begins with a quick review of how Process Models and Concept Models (Conceptual Data Models) can make a huge contribution when approached from a non-technical perspective. Then we move on to showing how User Stories and Use Cases are used to discover *external* requirements – how users wish to interact with an application – and how Service Specifications are used to define *internal* requirements – the validation, rules, and data manipulation performed behind the scenes. The principle that makes this so successful is splitting the monolithic Use Case into an external view (Use Cases or User Stories) and an internal view (Service Specifications.)

Key points include:

- Concept Models and Process Models – a quick review of these essential techniques, and the role they play in helping the Business Analyst define a future state.
- User Stories and Use Cases - how the application should behave *externally* in support of the people and processes using it, *plus* showing the two techniques are not *really* very different.
- Business Services – what the application should do *internally* regardless of who is using it, or how, which is essentially Service-Oriented Business Analysis.

Clear guidelines will be provided for:

- Progressing through well-defined Scope, Concept, and Detail (Specification) perspectives and levels of detail.
- Applying these techniques in an Agile setting, including dos and don'ts.
- Using these techniques in selecting COTS (Commercial Off-the-Shelf) software packages.

We'll also provide tips on facilitating discovery sessions, and simple but effective templates. As always, the methods will be illustrated with recent real-life examples and discussion.

One-sentence description

Most Business Analysts report disappointing results in applying Use Case techniques – this session provides proven, practical techniques for successfully applying Use Case and User Story methods.

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**Model-Driven Business Analysis Techniques
(That Work in the Real World)**

Simple, list-based requirements are a good starting point, but eventually requirements must be synthesised into a cohesive view of the desired to-be state. Only then will other, important requirements emerge. This information-filled half-day overview shows how to accomplish this with an integrated, model-driven framework comprising business-friendly data models, business process models, a unique form of use cases, and service specifications.

This workshop introduces business-friendly modelling techniques that have been proven on both custom development and packaged software projects. They are repeatable by analysts, relevant to business subject matter experts, and useful to developers. They are also surprisingly popular with Agile teams because they support “just enough” modeling to get started with confidence, and then let iterative development take over. It distills the material from Alec’s three, two-day workshops on Working With Business Processes, Business-Oriented Data Modelling, and Use Cases & Services.

After a quick review of bad advice in the world of business analysis, the consequences of applying it, and why it just doesn’t work, we’ll study four integrated modelling techniques, each addressing one fundamental aspect of the problem space:

- Concept Models – developing a common understanding of what things the process and application need to know about with a business-friendly conceptual data model; and then transitioning to a more rigorous and detailed logical data model.
- Process Scope Models and Process Workflow Models - what the real business processes are, how the as-is process works, and how the to-be process should work.
- Use Cases - how the application should behave *externally* in support of the people and processes using it.
- Business Services - what the application should do *internally* regardless of who is using it, or how.

Specific attention will be given to showing how to:

- Progress through well-defined Scope, Concept, and Detail (Specification) perspectives and levels of detail.
- Apply these techniques in an Agile setting, including dos and don’ts.

One-sentence description:

Alec explains the resurgence of interest in model-based techniques and best practices for four kinds of models in an integrated framework.

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**Essentials of Facilitation
Session Techniques for Business and Process Analysts**

Carrying out any type of business analysis requires a mix of one-on-one interviews and facilitated workshops, whether in-person or connected, so skills in gathering, presenting, and validating information in group sessions have become essential for analysts and architects. This is the case whether the job at hand is a situation analysis, process mapping, requirements discovery, data modelling, or any other initiative that requires input from multiple participants.

Even for an experienced professional, though, facilitation can be a daunting prospect. “How can I initiate the session without silly inclusion activities?” “How can I keep an active group on track and productive?” “How can I deal with the inevitable disagreements or difficult participants?” Luckily, there are specific ways to deal with these and other situations.

Unlike general purpose “manage your meetings” courses, this workshop was developed expressly for business analysts, process and application architects, and project leaders. Backed up by 35 years of facilitation experience, it will introduce core facilitation techniques.

Key topics include:

- The importance of pre-session interviews – what to ask, what to listen for, and what to ignore.
- How to structure a session plan.
- The surprising value of “venting” early in a session.
- Five essential techniques for the facilitator.
- Proven session agendas, and a review of actual session outcomes.

One-sentence description

Whether you are conducting an in-person or virtual session, a small number of simple, powerful, and *learnable* techniques can make all the difference to the session’s success.

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***Packaged Software Gone Bad –
Lessons From the World of Project Recovery***

Packaged software implementations can go extremely well, delivering excellent, even transformational, results. Other times... not so much. The speaker has seen enterprises of all types spend vast amounts of money selecting and implementing purchased software - US\$3B in the most extreme case! And after all that expense, it simply doesn't work, or works so poorly the organisation is worse off than before. When he's called in to assist with "project recovery," Alec finds the factors leading to these failures are surprisingly consistent, and almost always surprising. They also generally apply to bespoke solution development.

Come to this tutorial to learn the reasons behind many of these failures, and to share your experiences. It won't be all doom and gloom – we'll also look at factors contributing to extremely successful implementations. Everything will be backed up by practical techniques, tips, and guidelines, and examples from the speaker's experience, including:

- How one of the world's most admired companies spent \$1B on an implementation and achieved worse performance.
- The case of the public institution that spent \$80M configuring cloud-based HR and Payroll software, had nothing functional to show for it, and how the situation was resolved.
- On a brighter note, how a manufacturer applied the techniques we'll discuss (including data modelling!) over the software vendor's objections and became a global showcase account.
- Using business objects, events, and services to identify essential solution requirements.
- Why the end-to-end business process perspective is essential to ensuring the completeness of your user stories and functional requirements.

One-sentence description

Alec shares the surprising reasons packaged software selection and implementation often goes disastrously wrong, and how to avoid them.

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**The Data-Process Connection –
How Concept Modelling Supports Process, Business Analysis,
and Architecture Work –**

Whether you call it a conceptual data model, a domain map, a business object model, or even a “thing model,” a concept model is invaluable to process and architecture initiatives. Why? Because processes, capabilities, and solutions act on “things” – Settle *Claim*, Register *Unit*, Resolve *Service Issue*, and so on. Those things are usually “entities” or “objects” in the concept model, and clarity on “what is *one* of these things?” contributes immensely to clarity on what the corresponding processes are.

After introducing methods to get people, even C-level executives, engaged in concept modelling, we’ll introduce and get practice with guidelines to ensure proper naming and definition of entities/concepts/business objects. We’ll also see that success depends on recognising that a concept model is a description of a *business*, not a description of a *database*. Another key – don’t call it a *data model*!

Drawing on almost forty years of successful modelling, on projects of every size and type, this session introduces proven techniques backed up with current, real-life examples. Topics include:

- Concept modelling essentials – things, facts about things, and the policies and rules governing things.
- “Guerrilla modelling” – how to get started on concept modelling without anyone realising it.
- Naming conventions and graphic guidelines – ensuring correctness, consistency, and readability.
- Concept models as a starting point for process discovery
- Practical examples of concept modelling supporting process work, architecture work, and commercial software selection.

One-sentence description

Alec illustrates the many ways concept models (conceptual data models) support business process change and business analysis.

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Getting to the Essence – How to Get to the “What” Beyond the “Who and “How”

In his landmark article, “No Silver Bullet – Essence and Accidents of Software Engineering,” Fred Brooks made the point that business analysis will always be challenging. Why? Because it’s relatively easy to describe the “who and how” of the current state – this person (*who*) does something using that tool (*how*,) then another person does something using another tool, and so on. What’s difficult – often very difficult – is figuring out *what* is actually being accomplished. Sometimes, our business clients and subject matter experts are so immersed in their job, and how they do it, they’ve literally lost sight of *what* is really being done.

That makes building a useful future state very difficult, and that’s why the speaker has concluded a fundamental ability of great analysts and architects is separating the “what” from the “who, how, and why.”

Backed up by numerous real-life examples, this session will provide practical techniques and frameworks for dealing with a variety of business analysis challenges. After learning “The Three ‘Es’ of getting to the essence – Entities, Events, and Essential Activities – key learning points include demonstrating how to:

- Build the two essential models that are at the core of successful business analysis.
- Keep people from diving into unhelpful detail while analysing the “as-is” state.
- Make your use cases / user stories more useful and avoid drifting into the “useless case” zone.
- Ensure evaluation and selection of purchased solutions is focused on “what” must be provided.
- Free people from over-attachment to the as-is state during organisational or process change.

Alternate version for Business Analysts, especially BAs starting in the field. Highly rated by experienced Business Analysts, too:

Essence vs. Accident – A Life Lesson for Business Analysts

When asked “What’s the most important lesson you’ve learned in your Business Analysis career?” Alec knew the answer immediately – it was the core message in Fred Brooks’ classic article “No Silver Bullet - Essence and Accidents of Software Engineering.” The title mentions “software engineering” but it’s really about a fundamental difficulty in Business Analysis – the challenge of separating the Essence - the “what” - from the Accident - the “who and how.” For example, it’s relatively easy to describe the current “who and how” – this person (*who*) does something using that tool (*how*,) then another person does something using another tool, and so on. What’s difficult – often very difficult – is figuring out *what* is actually being accomplished. Sometimes, our business clients and subject matter experts are so immersed in their job, and *how* they do it, they’ve literally lost sight of *what* is really being done.

This short but content-packed presentation will first cover some examples to illustrate the principle and show why “essence vs. accident” can be so challenging, then shift to real-life examples of using this principle in four areas:

1. Business Process Change
2. Data Modelling and Business Information
3. Application Requirements with Use Cases / User Stories
4. Even an intervention to address organisational dysfunction

One-sentence description

Alec describes the difference between “essence” and “accident” (“what” vs. “who and how”) and ways to use this to be a better Business Analyst.

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**Integrating Change into Your Business Process Approach –
*Timing Is Everything***

Throughout forty years of consulting, the speaker has refined methods and techniques that lead to significant process change in as little as two or three days. It has also led to interesting observations from clients about its impact on change. One said, “When we follow your method strictly, the usual resistance to change simply doesn’t materialise.” Another said, “We like the way support for change is built in throughout the method, not bolted on at the end.” This is not an accident - refinements to the techniques, and to their sequence and emphasis been chosen to help participants understand and embrace the need for change. They also help avoid unanticipated consequences.

This session will introduce the central features of this methodology and introduce “minimalist” but highly effective session plans. Key points include:

- People want to be heard – the value of “venting” in discovery sessions.
- Never start with “why?” - the problem with doing problem statements too soon.
- “What” first, “who and how” later – how “abstraction to the essence” dissipates resistance.
- Understanding all perspectives – the critical role of a stakeholder- and enabler-based assessments
- Avoiding the Big Bang – a feature-based approach to process design/redesign.

One-sentence description

Alec has observed many times that the often-mentioned “resistance to change” doesn’t arise in his assignments; here, he explains the techniques that account this.

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**The T-Shaped Professional –
*Achieving Data Management (or Business Process) Goals by Other Means***

*** This one was written for a Data Management audience, but I also have versions for Business Process and Business Analysis groups. I can produce a more generalised version that will appeal to all audiences. ***

Organisations increasingly value individuals with deep expertise in a specific discipline, such as Data Modelling or Business Intelligence, but also with skills in other areas. These other skills aren't necessarily at the expert level and must be complemented by two essential "soft skills" before the whole package works. This is the so-called and often misunderstood "T-shaped skill set" – depth plus breadth plus the social skills that are at the heart of the concept. Applying skills outside your data-related expertise is often an excellent way to achieve your core Data, Business Process, or Business Analysis goals.

We'll introduce the essentials of being "T-shaped," including the soft skills that are at the heart of the concept. Then, we'll cover real-life examples of core goals being achieved by applying other skills. Useful tips and frameworks will be provided for each of them, with emphasis on these four:

- *Business Processes*: how to take advantage of the connection between business processes and enterprise data.
- *Application Requirements*: why the data perspective is absolutely crucial in both purchased and custom software implementations.
- *Facilitation*: how some of the fundamental techniques employed by a skilled facilitator can raise data management awareness.
- *General Business Frameworks*: Frameworks such as the four quadrants of corporate culture, the impact of paradigms, the enablers of organisational change, and the strategic differentiator have all contributed, often in surprising ways, to achieving Data Management goals.

One-sentence description

Alec explains the importance for Data or Business Process professionals (you choose) of the "T-shaped" concept, which emphasises a deep skill in one area which is made more useful by combining with a breadth of skills in other areas, especially some critical "soft skills."

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Short bio Alec Sharp, Senior Consultant

With over 40 years of experience as a self-employed consultant, **Alec Sharp** has provided data modelling, business analysis, business process change, and facilitation expertise throughout North America, Asia, Europe, and Australasia. He has also delivered hundreds of top-rated presentations at international conferences, always based on real-life experience. These include “Analyst or Stenographer?,” “Days not Weeks or Months – Process Change in Agile Timeframes,” and “Getting to the Essence – Discovering the *What* Beyond the *Who* and *How*.” Alec’s 90-minute briefing “*Five Things You Need to Know About Business Processes*” has been delivered to senior executives at major organisations around the globe. His book “Workflow Modeling” is a consistent best seller in the Business Process Change field, and is widely used as an MBA text and consulting guide. 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 “Business-Oriented Data Modelling,” “Advanced Data Modelling,” “Working With Business Processes,” “Advanced Business Process Techniques,” and “Requirements Modelling,” are conducted (pre-COVID) on four or five continents each year, at many of the world’s best-known organisations. His classes are practical and energetic, consistently earning “excellent” ratings.

Longer bio Alec Sharp, Senior Consultant

Alec Sharp, a senior consultant with Clariteq Systems Consulting, has deep expertise in a rare combination of fields – business analysis and requirements specification; business process change; and business-oriented data modelling. Increasingly, his work involves facilitation, organisational change, and project recovery. 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 “Process Change in Agile Timeframes,” “The Human Side of Data Modelling,” “Analyst or Stenographer?,” “Becoming a T-Shaped Professional,” and “Agile and Modelling.” 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 Modeling: 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 “Requirements Modelling,” “Working With Business Processes,” “Advanced Business Process Techniques,” “Business-Oriented Data Modelling,” “Business-Oriented Data Modelling - Masterclass,” and “Model-Driven Business Analysis Techniques” are conducted on four or five continents each year, at many of the world’s best-known organisations. His classes are practical and energetic, consistently earning “excellent” ratings.