

Kathleen B. (Kitty) Hass

Award Winning Author, Consultant, Facilitator, and Keynote Speaker

Principal Consultant, Kathleen Hass & Associates, Inc.

STRATEGY EXECUTION, COMPLEX PROJECT MANAGEMENT AND ENTERPRISE BUSINESS ANALYSIS PRACTICES

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IIBA Board of Directors Vice Chair

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Principal consultant and founder of Kathleen Hass and Associates, Inc., the leading expert in enterprise business analysis and complex project management in the world of business. Ms. Hass is a prominent presenter at industry conferences, author, and lecturer. Expertise includes PM/BA maturity and competency assessments, strategic planning, implementing Centers of Excellence, organizational transformation, portfolio management, leading software-intensive projects, executive coaching, building and leading strategic project teams, and managing complex programs.

Education, Professional Certifications, and Associations

Education

- B.S. in Business Administration, summa cum laude, double major in Management Information Systems and Economics, Western Connecticut University
- Recipient of the Dean's Award for the Most Outstanding Student

Certifications

- Certified Organizational Capability Maturity Assessor based on the Carnegie Mellon University Software Engineering Institute Capability Maturity Model (SEI CMMI®)
- Certified Baldrige National Quality Program Examiner
- Certified Facilitator, Zenger-Miller

Associations

- Director, IIBA (International Institute of Business Analysis), Chair of the Board Nominating Committee, and member of the Business Analysis Body of Knowledge (BABOK®) version 2.0 Committee, contributing to several chapters and lead author of the Enterprise Analysis chapter
- Member of the Capella University IT Advisory Council
- Developer and Instructor for the Villanova University Mastering Business Analysis Online Certificate Program
- Member of the University of California, Irvine Extension Business Analyst Certificate Advisory Board
- Member and co-founder of the Business Analysis Leadership Consortium

Significant Consulting Engagements

Koch Business Solutions, Wichita, KS

Successfully conducted two business analysis assessments for workforce capability and organizational practice maturity for the IT organization of KBS. The assessment used industry proven assessment methods and was based on our world-class PM Capability Models. Deliverables included:

- Individual PM Capability Summary Report, comparing the individual BA with other BAs in the industry working on similar assignments

- Organizational Findings and Recommendations presentation
- Workshop to define the roadmap to transition to a value-based PM practice

International Monetary Fund, Washington, DC

Conducted a BA Capability Assessment for the IT organization. Facilitated and consulted with the BA leaders to develop their business case for a Value-based BA Practice.

Bristol-Myers Squibb, Princeton, NJ

Conducted an individual and workforce BA Capability Assessment for the team of twenty BAs. Facilitated and consulted with the BA Director team to define their BA Practice and Engagement model and BA Practice Improvement Roadmap.

New York City Transit Authority, New York City, NY

Conducted a two-day workshop to develop the program charter and supporting information for the Asset Management Improvement Program.

ASB Bank, Auckland, New Zealand

Successfully conducted a business analysis individual and workforce assessment for this New Zealand bank owned by the Commonwealth Bank of Australia. The assessment used industry proven assessment methods and was based on our BA Individual and Workforce Capability Model, which is consistent with the IIBA® Competency Model 3.0. Results included:

- Individual BA Capability Summary Report, comparing the individual BA with other BAs in the industry working on similar assignments
- Individual BA proposed Professional Development Plan to close competency gaps
- Organizational Findings and Recommendations presentation

New Zealand Ministry of Education Business Analysis Maturity Assessment, Wellington, NZ

Successfully conducted a formal business analysis organizational maturity assessment for the Ministry IT group. The assessment used industry proven assessment methods and our organizational capability maturity reference model, which is consistent with the IIBA® BABOK® version 2.0. Results included:

- Organizational Maturity Data Summary Report
- Organizational Maturity Findings and Recommendations Report and presentation
- Roadmap and Action Plan designed to close the gaps for level two maturity, and to implement key level 3 capabilities and competencies

Sun Life Financial Business Analysis Workforce Capability Assessment, Boston, MA and Shannon, Ireland

Conducted an assessment of the BA workforce capabilities of the IT organizations located in Boston, Ireland, and India. Delivered the keynote address at the BA Summits conducted for the BA community, one in Boston and one in Ireland.

Manheim, wholly owned subsidiary of Cox Enterprises, Inc PM and BA Assessments, Atlanta, GA

Conducted an assessment of the PM and BA capabilities of the Manheim IT organizations. As a result of the qualitative and quantified assessment of competencies:

- Developed a 2-year BA/PM Professional Development Program
- Implemented an Enterprise Center of Excellence to Steer the Course
- Provided ongoing mentoring and support services to implement the program

MassMutual Financial Group, IT Strategy and Operations, Springfield, MA

This engagement involved facilitated workshops for the IT teams of business analysts and project managers. In addition, provide ongoing virtual and on-site consulting to the IT management team. Workshops topics included:

- *Communicating Strategically*
Developed executive stakeholder analysis, executive messaging, and problem analysis, and alternative analysis capabilities to improve communications and issue resolutions at executive steering committee meetings
- *Finally Getting it Right: Complex Project Management, a New Model*
Diagnosed the complexity profile of complex projects, determined the complexity dimensions that are present on critical projects, and determined management approaches to manage the complexities

West Bend Mutual Insurance Company, Organizational Assessment Services, West Bend, WI

Successfully conducted two formal business analysis assessments: (1) organizational maturity and (2) individual competency for three departments within the 1200-person IT group. The assessments used industry proven assessment methods and our newly developed organizational capability maturity model and individual competency model based the newly released IIBA® BABOK® version 2.0. Results included:

- Organizational Maturity Data Summary Report
- Organizational Maturity Findings and Recommendations Report
- Individual Competency Data Summary reports for each business analysis and summarized for the three groups, and for the entire team of business analysts
- Professional Development plans for each business analysis based on their assessment results
- Roadmap and Action Plan designed to close the gaps for level two maturity, and to implement key level 3 capabilities and competencies

JM Family Enterprises, Inc., Boca Raton, FL

Conducted an assessment of Business Analyst competencies for the BA workforce. Analyzed the results of the assessment and prepared a 2-year improvement plan. The assessment used industry proven assessment methods. Results included:

- Individual Competency Data Summary reports for each business analysis and summarized for the three groups, and for the entire team of business analysts
- Professional Development plans for each business analysis based on their assessment results
- Roadmap and Action Plan designed to close the competency gaps and to implement mature capabilities and competencies

Toyota Financial Services and Toyota Motor Sales, Project Maturity Program, Torrance, CA

Successfully managed this strategic consulting engagement to provide high-quality project management leadership through executive coaching, facilitated planning and PM mentoring services. Using a multi-dimensional approach, Ms. Hass first conducted a Project Management Maturity Assessment and a complete Portfolio Audit. The assessment was followed by detailed planning sessions to launch the Project Success Improvement Program. The improvement program consisted of multiple projects targeted to improve project performance and achieve Project Management Maturity Level 3 including: (1) project audit and rescue of a critical strategic project, (2) facilitated project initiation workshops to ensure a strong start for new projects or new phases of existing projects, (3) implementation of a formal Project Manager Mentoring Program, (3) implementation of Project Management best practices, (4) delivery of project management training, (5) strengthening of the Executive Sponsorship and Portfolio

Management Process, and (6) supplying Professional Project Managers to lead projects to augment the internal project management staff. As Executive Coach, Ms. Hass provided leadership and guidance to the executive team throughout the improvement initiatives. This enterprise endeavor enabled Toyota to successfully deliver critical technology projects to support critical business strategy.

Confidential Government Agency, Professional Project Manager Certification Program, Washington, DC

Managed this two-year project to build a four-tiered Professional Project Manager Certification (PPMC) program consisting of both project management and system engineering courses. The Management Concepts PPMC team was comprised of instructional designers, course developers and test developers who worked with a professional test develop company. When the program went into production in late 2004, the courses were in high demand, most filled to capacity and with waiting lists. To help implement practices learned in the classroom, Ms. Hass and her consulting team are providing mentoring, facilitated planning sessions and customized workshops.

Colorado Springs Utilities, Using Maturity Assessments to Unleash Organization Capabilities, Colorado Springs, CO

Lead assessor for the organizational maturity assessment conducted for Colorado Springs Utilities. After a three-year quest to implement project management practices, the assessment was intended to advance the organization to one capable of delivering projects flawlessly. The assessment team consisted of three senior consultants who reviewed project management practices across the organization. The approach to conducting the assessment was multi-dimensional and included interviews with members of the management team, selection of projects to serve as a basis for the assessment, administration of surveys to project managers, individual interviews with project managers and facilitated focus group sessions. The assessment team also reviewed project artifacts to substantiate the findings and recommendations. Results were analyzed, scores compared, and the information was distilled by the assessment team to prepare high-impact, measurable recommendations to sustain the momentum of project management improvements.

Created the CompassPM™ Capability Maturity Model (CompassPM™ CMM) for use by assessment teams. The model served the basis of project management improvement strategy for the utility. The model describes the key elements of a fully effective project management environment. These elements were used for benchmarking and evaluation. Considering the presence or absence of these elements, the assessment team determined a ranking of one to five for the maturity of project management processes at Colorado Springs Utilities. The established ranking scale provides plateaus for the purpose of continuous improvement of project delivery capability. The assessment team presented an eight-point action plan designed to achieve the next level of maturity.

Agencies within the Federal Government: Executive Seminars and Facilitated Workshops, Washington, DC

Conducted executive seminars and follow-on executive coaching to the Risk Management Agency Program Support Team at USDA and the USGS IT management team. Conduction facilitated planning and risk management workshops for the National Archives and Records Administration technology transformation initiative.

Salt Lake Organizing Committee for the 2002 Olympic Winter Games, Consulting Services, Salt Lake City, UT

Led Risk Management, Program Planning and Team Building workshops for the SLOC Information Systems and Telecommunications teams. Provided Project Management training and mentoring to the technology management and project teams.

The SABRE Group, Airline Group Desktop Standardization Project Consultant, Dallas, TX

Served as Program Manager Coach for the Project Initiation, Phase Reviews, Process Re-Engineering, Project Office formation, and Risk Management processes. The project objective to reduce the Total Cost of Ownership by 25% and improve support service levels was achieved on time and on budget.

Sulzer Medica, R&D Project Management Consulting Services, Denver, CO

Led the Project Management Office team that created project management structure for critical Research and Development projects. Working with senior scientists, built project charters, work breakdown structures, project schedules, and risk management plans. The effort significantly improved management visibility into the projects, thus improving strategic portfolio management decision-making.

Qwest Communications, Portfolio Management and Project Recovery Services, Denver, CO

Led the implementation of Enterprise Portfolio Management process with the CEO team. Integrating the process into strategic planning, the effort focused on implementing a structured project prioritization process and executive control gate reviews. As a result, projects were strategically aligned and funded in phases based on ongoing review of risks and business case projections.

Ms. Hass also facilitated the rescue of a critical troubled project. The project was in trouble due to the non-performance of the offshore development team, and the inability of the test team to create a viable System Integration, Verification, and Validation plan. Ms. Hass facilitated workshops and project team meetings, leading the team through creation and execution of the recovery plan.

Work Experience

Kathleen Hass and Associates, Inc.

Principal Consultant February 2009-Present

Kathleen Hass is the founder and principal for this consultancy, specializing in strategic planning and execution, organization assessment and turnaround, complex project management & business analysis practices.

Management Concepts

Project Management and Business Analysis Practice Lead December 2002-January 2009

Kathleen Hass is the Project Management & Business Analysis Practice Leader for Management Concepts, Inc. Ms. Hass is a prominent presenter at industry conferences, author and lecturer in strategic project management and business analysis disciplines. Her expertise includes leading technology and software-intensive projects, executive coaching, building and leading strategic project teams, and program management for large, complex engagements. Ms. Hass has more than 25 years of experience in project management and business analysis, including project portfolio management implementation, project office creation and management, business process re-engineering, IT applications development and technology deployment, project management and business analysis training and mentoring, and requirements management. Ms. Hass has managed large, complex projects in the airline, telecommunications, retail, manufacturing industries, and in the U.S. Federal Government.

Her consulting experience includes engagements with multiple agencies within the Federal Government, e.g., USDA, USGS, NARA and an agency within the Intelligence Community, as well as industry engagements at Colorado Springs Utilities, Toyota Financial Services, Toyota Motor Sales, the Salt Lake Organizing Committee for the 2002 Olympic Winter Games, Hilti US Inc., The SABRE Group, Sulzer Medica, and Qwest Communications. Client services included maturity assessments, project quality and risk assessments, project launches, troubled

project recovery, risk management, and implementation of program management offices, strategic planning and project portfolio management processes.

Provant Project Management (formerly Project Management Services, Inc.)

Assistant Vice President 1999-2002

As site manager for the Provant Project Management Denver office, Ms. Hass has built and managed this regional office from the ground up. Ms. Hass directs the staffing, marketing, client relationship management and oversight of the Denver office, which spans the Rocky Mountain region.

Ms. Hass, who is a specialist in leading workshops for initiating projects, also served as a senior consultant in establishing Program Management Offices and Project Management Methodologies and providing oversight to large, complex development projects. As a member of the Project Management Center of Excellence (PMCE), Ms. Hass has served as an instructor and workshop facilitator.

American Stores

Project Management Office Director 1995-1999

Ms. Hass created and managed all aspects of the Project Office supporting the largest re-engineering project in the nation. The \$3M project consisted of more than 100 productivity enhancement, cost reduction, information accessibility, and decision support projects. Ms. Hass instituted the Project Office structure, methods, and controls based on PMI industry-standard project management practices. Led project managers in project initiation, planning, control, and quality/scope management, resulting in on-time performance, which reduced cost overruns by 80%. Ms. Hass designed and directed the executive project selection, prioritization, risk, and vendor management processes.

Unisys Corporation

IT Manager 1982-1995

Ms. Hass managed the software development team consisting of project managers, client managers, architects, business analysts and developers. Ms. Hass led the integration and implementation of a purchased software suite consisting of Requisitioning, Purchasing, Receiving, Inspection, and Accounts Payable applications comprised of more than 1200 programs.

Ms. Hass led the Project Management Improvement Program across four geographically dispersed business units. The result was the transformation of the IT department. Project management best practices were assessed and improved using the industry benchmark improvement structure designed by Carnegie Mellon University Software Engineering Institute (SEI), the SEI Capability Maturity Assessment Model. The James Martin Information Engineering software development methodologies were integrated with project management to increase project performance. The result: a consistent set of practices and improved management oversight processes were put in place across four dispersed business units setting the stage for improved monitoring and control and continuous improvement of project delivery.

Papers, Publications and Presentations

Books

2016

The Future is Now: the 21st Century Enterprise Business Analyst – Strategic, Value-based Business Relationship Managers

2014

Breakthrough Business Analysis: Implementing and Sustaining a Value-based Practice

2011

The Enterprise Business Analyst: Developing Creative Solutions to Complex Business Problems

2009

- **Managing Complex Projects: A New Model** awarded the **2009 PMI David I. Cleland Project Management Literature Award**, to recognize and honor the best project management literature published during the previous calendar year.
- **The 77 Deadly Sins of Project Management** (contributing author)

2008

The Business Analysis Essentials Library, consisting of the following titles:

1. Professionalizing Business Analysis, Breaking the Cycle of Challenged Projects
2. The Business Analyst as Strategist, Translating Business Strategies into Valuable Solutions
3. Unearthing Business Requirements, Elicitation Tools and Techniques
4. Getting it Right, Business Requirement Analysis Tools and Techniques
5. The Art and Power of Facilitation, Running Powerful Meetings
6. From Analyst to Leader, Elevating the Role of the Business Analyst

Research Projects

1. *The Bottom Line on Project Complexity: Applying a New Complexity Model*. This study examines the dimensions that increase project complexity, including team size, project duration, schedule, cost and scope flexibility, understanding of the problem and solution, stability of requirements, strategic importance, level of organizational change, inter-project dependencies, and political sensitivity and validates the new *Project Complexity Model* profiled in the PMI award-winning book, *Managing Project Complexity: A New Model, Management Concepts* (2009).
2. *Is Your Business Analysis Practice Mature Enough?* This study evaluates and benchmarks the 2010 maturity levels of Business Analysis Practices in diverse industries and organizations and contributes to the advancement of the body of knowledge and research in the field of business analysis.

Papers and Articles

1. Organizational Maturity Assessment, A CMM-Based Appraisal of Project Management Practices, Management Concepts, Inc., 2004
2. From Strategy to Action: Enterprise Portfolio Management, Management Concepts, Inc., 2005
3. The Strategic Project Leader, Management Concepts, Inc. 2005
4. Flawless Project Launch Practices, The Bridge From Business Opportunity to Project Execution, Practices, Management Concepts, Inc., 2005
5. The Pathway from Knowledge to Practice, Map out Your Project Management Mentoring Program, Practices, Management Concepts, Inc., 2005
6. The Business Analyst, The Pivotal IT Role of the Future, Management Concepts, Inc., 2005
7. The Business Analysis Center of Excellence, The Cornerstone of Business Transformation, Management Concepts, Inc., 2007
8. The Program Management Office, A Center of Excellence for Project Management, Management Concepts, Inc., 2007
9. Living on the Edge, Managing Project Complexity, Management Concepts, Inc., 2008

10. Harness the Power of the Project Manager/Business Analyst Partnership, 2008
11. Business Analyst Proficiency: How capable do I need to be? 2010
12. Planting the Seeds to Grow a Mature Business Analysis Practice, 2010
13. Planting the Seeds to Grow a Complex Project Management Practice, 2010
14. Project Management and Business Analysis Maturity Assessments: The Journey to Professional Excellence, 2010
15. Finally! A Proven Framework to Implement Value-Based Business Analysis, BATimes, 2015
16. The Future is Now: The 21st Century Enterprise Project Manager, BATimes, 2015
17. The Future is Now: The 21st Century Enterprise Business Analyst, BATimes, 2015
18. The Innovative Enterprise Business Analyst, BATimes, 2015
19. The Transformational Enterprise Business Analyst, BATimes, 2015

Keynotes, Presentations, Workshops, Seminars and Webinars

2015

1. New Jersey IIBA Chapter meeting, *Breakthrough Business Analysis, Implementing and Sustaining a Value-Based BA Practice*, Webinar April 2015
2. International Institute of Business Analysis, *Business Success in the new economy Critical Business Practices for the Complexity of the 21st Century*, Webinar April 2015 (over 1,000 registrants)
3. Iowa Business Analysis Development Day (IBADD) 2015, *Breakthrough Business Analysis, Design-Centered Innovation*, Altoona, Iowa, Friday, May 2015
4. Southwestern Ohio Business Analysis Regional Conference, *Breakthrough Business Analysis: Collaboration, Creativity, and Design-Centered Innovation*, Sharonville Convention Center, May 2015
5. Wisconsin Business Analyst Development Day (WI BADD®) 8th annual conference, *Breakthrough Business Analysis, Implementing and Sustaining a Value-Based Practice and Breakthrough Business Analysis, Collaboration, Creativity, and Deliberate Design-Centered Innovation*, Exhibition Hall at the Alliant Energy Center in Madison, Wisconsin Tuesday, May 2015
6. AT&T Project Managers and Business Analysts, *Business Success in the new economy Critical Business Practices for the Complexity of the 21st Century*, Webinar June 2015
7. IIBA Denver Chapter meeting, *Breakthrough Business Analysis, Collaboration, Creativity, and Deliberate Design-Centered Innovation*, September 2015
8. The Fusion of Technology & Innovation, ProjectWorld & World Congress for Business Analysts Conference, *The New Project Leadership Model, The Promise of the PM/BA Partnership*, Seattle, October 2015,
9. IIBA Région de Québec and the JIQ L'ÉVÉNEMENT TI 2015, Quebec City, *The Future is now: the 21st Century Enterprise Business Analyst – Strategic, Value-based Business Relationship Managers*, Quebec City, CA, November 2015
10. Building Business Capability Conference, *The Future is now: the 21st Century Enterprise Business Analyst- Roles and Capabilities*, Las Vegas, NV, November 2015

2014

1. University of Toronto webinar, *From Analyst to Leader: Elevating the Role of the Business Analyst*, February, 2014
2. Central Indiana IIBA Professional Development Day, *Adapting BA Practices for Complex Projects*, April 2014
3. PMI Mile High Chapter Annual Symposium, *How the PM and BA Leadership Role Adapts for Complex Projects*, Denver, CO April 2014
4. Wisconsin BA Development Day, *Adapting BA Practices for Complex Projects*, Madison, WI, May 2014
5. PMI-Madison/South Central Wisconsin Chapter Professional Development Day, *The New Project Leadership Model: The Promise of the PM/BA Partnership in a Complex World*, Madison, WI, May 2014

6. Business Analysis Franco-Suisse Symposium, *Adapting the BA and PM Role for Complex Projects*, Paris, France and Geneva, Switzerland, June, 2014
7. Project World for World Congress & Business Analyst, *The New Project Leadership Model: The Promise of the PM/BA Partnership in a Complex World and Design-based Business Analysis*, Seattle WA Sept 2014.
8. IIBA Conference, *The New Project Leadership Model: The Promise of the PM/BA Partnership in a Complex World*, Montreal, September 2014
9. *Breakthrough Business Analysis Workshop*, Redvespa, LLC, Auckland and Wellington, New Zealand, October, 2014
10. Building Business Capability Annual Conference, *Breakthrough Business Analysis, Implementing and Sustaining a Value-based Practice*, Ft. Lauderdale, FL, November, 2014
11. University of California, Irving Extension webinar, *Breakthrough Business Analysis, Implementing and Sustaining a Value-based Practice*, November, 2014

2013

1. Rochester, NY IIBA Chapter event, *Adapting BA Practices for Complex Projects*, Omaha, NB Feb 2013
2. MSP IIBA Chapter BA Development Day, *Adapting BA Practices for Complex Projects*, April 2013
3. Wisconsin IIBA BA Development Day, *Adapting BA Practices for Complex Projects*, April 2013
4. Wisconsin IIBA BA Development Day, *BA as Creative Leader: if it's Creativity you want, it's Creativity you will get*, April 2013
5. University of California, Irving Webinar, *Adapting BA Practices for Complex Projects*, May 2013
6. Kingston, Jamaica IIBA Chapter event, *Adapting BA Practices for Complex Projects*, May 2013
7. IIBA Webinar Series, The Enterprise BA, *Adapting BA Practices for Complex Strategic Projects*, June 2013
8. Enfocus Webinar Series, *Adapting the BA/PM Role for Complex Projects*, September 2013
9. Silicon Valley IIBA Chapter event, *Adapting BA Practices for Complex Projects*, September 2013
10. SE Wisconsin/Milwaukee PMI PDD, *The New Project Leadership Model, The Promise of the PM/BA Partnership*, October 2013
11. NYC PMI PDD, *The New Project Leadership Model, The Promise of the PM/BA Partnership*, November 2013

2012

1. Heartland IIBA Chapter, *Adapting BA Practices for Complex Projects*, Omaha, NB March 2012
2. New York City IIBA Chapter, *Adapting BA Practices for Complex Projects*, March 2012
3. Central Iowa IIBA Chapter, *Adapting BA Practices for Complex Projects*, Des Moines, IA March 2012
4. Central Indiana IIBA Chapter Professional Development Day Conference, Indianapolis, IN April 2012
5. Keynote: *Business Success in the New Economy*
6. Track session: *Adapting BA Practices for Complex Projects*, Indianapolis, IN April 2012
7. Central Illinois PMI Chapter Conference, Bloomington, IL, May 2012
8. *The New Project Leadership Model: The Promise of the PM/BA Partnership*
9. *Strategic Communications, It's Like Stakeholder Management on Steroids*
10. *Adapting the PM Role for Complex Projects, Part I*
11. *Adapting the PM Role for Complex Projects, Part II*
12. New Jersey PMI Symposium, *Adapting the BA&PM Role for Complex Strategic Projects*, May 2012
13. Cincinnati IIBA Chapter Event presentation, *Adapting BA&PM Practices for Complex Strategic Projects*, August, 2012

2011

1. Calgary IIBA Chapter Dinner Keynote, *If it's Creativity You Want, then Creativity You Will Get! Expert Facilitation that Fosters Creativity*, Calgary, Alberta, Canada, April 2011
2. BAWorld Calgary, *Adapting BA Practices for Complex Projects*, Calgary, Alberta, Canada, April 2011
3. Enmax Power and Utility, Canadian Pacific Railway, and Cenovus Energy, *Business Success in the New Economy: Critical Business Practices for the 21st Century*, Calgary, Alberta, Canada, April 2011
4. Philadelphia IIBA and PMI Chapters, *Critical Business Practices for the 21st Century*, May 2011

5. Pfizer Inc, *Business Success in the New Economy*, Collegeville, PA, May 2011
6. Webinar with edevTechnologies: *Adapting the BA Role for Complex Projects*, July 2011
7. Webinar with Microsoft and edevTechnologies: *Using Requirements for Test Automation*, October 2011
8. Minneapolis / St. Paul IIBA Chapter Dinner meeting, *Adapting BA Practices for Complex Projects*, October, 2011
9. IIBA BBC Conference, *Adapting BA Practices for Complex Projects*, Ft. Lauderdale, FL November 2011

2010

1. Keynote Presentations
 - a. Implementing an Enterprise Practice Center: *The Cornerstone of Business Transformation*
 - b. Finally Getting it Right: *Complex Project Management, a 21st Century Imperative*
 - c. Business Analysis: *Where is the Profession Heading?*
 - d. The Journey to Professional Excellence: *Planting the Seeds to Grow a Mature BA Practice*
 - e. Is Your Business Analysis Practice Mature Enough?
2. Colorado Springs IIBA Chapter Launch, *The Journey to Professional Excellence: Planting the Seeds to Grow a Mature BA Practice*, January 2010
3. Requirements.net Podcast, *Requirements and Application Modernization*, February 2010
4. IIBA Webinar Series, ABC: *Authors, Books and Conversations, Discovering REAL Business Requirements for Software Success*, April 2010.
5. Chevron Corporation, *Business Success in the New Economy*, Webinar September 2010
6. IIBA Slovenia, first IIBA Conference Keynote: *Business Success in the New Economy: Critical Business Practices for the 21st Century*, October 2010
7. PMI Global Congress 2010-North America, *The Bottom Line on Project Complexity: Applying a New Complexity Model*, National Harbor, Maryland, October 2010
8. PMI Global Congress, *Finally getting It Right: complex Project Management, a 21st Century Imperative*, Washington DC, October 2010
9. IIBA Business Helping Business Conference, *Chapters Helping Chapters Seminar and Leadership Institute*, Washington DC, October 2010
10. IIBA New Zealand, Keynote, IIBA Conference Keynote Address BA Development Day, *Business Analysis: 21st Century Imperative for the New Economy?* November 2010
11. Joint Denver/Colorado Springs IIBA, *Business Success in the New Economy: Critical Business Practices for the 21st Century*, November 2010
12. Sun Life Financial, 2010 Analyst Summit Keynote Address: *Business Success in the New Economy: Critical Business Practices for the 21st Century*, December 2010

2009

1. Las Vegas IIBA Chapter Anniversary Celebration, *The Journey to Professional Excellence*, January 2009
2. IIBA Greater Rochester, NY Chapter Kick-off Meeting, *The Journey to Professional Excellence*, January 2009
3. DC / Baltimore Joint PMI/IIBA 5th Anniversary Celebration, *The Journey to Professional Excellence*, February 2009
4. IIBA Salt Lake Chapter Kickoff Meeting, *The Journey to Professional Excellence*, February 2009
5. Central PA Joint PMI/IIBA Meeting, *The Power of the PM/BA Partnership, Who Needs A BA Anyway?* March 2009
6. Highmark Blue Cross/Blue Shield, *Business Analysis Center of Excellence, The Cornerstone of Business Transformation*, March 18, 2009
7. New York City IBA Chapter Meeting, *The Power of the PM/BA Partnership, Who Needs A BA Anyway?* March 2009
8. New Jersey IIBA Chapter Meeting, *The Power of the PM/BA Partnership, Who Needs A BA Anyway?* March 2009
9. Philadelphia IIBA Chapter Meeting, *Improve Your BA Performance*, March 2009
10. GlaxoSmithKline, An Eye for Value, *What the Business Analyst Brings to the Agile Team*, March 2009
11. The Vanguard Group, BSA Vision Conference and Practitioner Forum, *Business Analysis Trends*, March 2009
12. IIBA Webinar, *Business Analysis, Where the Industry is Heading*, April 2009

13. Denver IIBA Chapter Meeting, *Where the Industry is Heading*, May 2009
14. BusinessAnalysisWorld Seattle, Keynote Address *Where the Industry is Heading*, and track presentation, *BA as Politician*, June 2009
15. BusinessAnalysisWorld Minneapolis, Keynote Address *Where the Industry is Heading*, and track presentation, *BA as Politician*, June 2009
16. CIO Forum sponsored by IIBA, *The Value of Corporate Membership*, Baltimore, June 2009
17. BusinessAnalysisWorld Denver, *The Living Business Case*, and *The BA Center of Excellence, The Foundation of a Mature BA Practice*, September 2009

2008

1. IIBA Greater Boston Chapter Presentation, Professionalizing Business Analysis, January 2008
2. Office of Surface Mining (Virtual Roundtable), *Living on the Edge: Managing Project Complexity*, February 2008
3. IIBA Greater Philadelphia Chapter, *The Business Analysis Center of Excellence, The Cornerstone of Business Transformation*, March 2008
4. PMI Region 5 2008 Symposium Hosted by the Baltimore Chapter, *Living on the Edge, Managing Project Complexity, 75 Minute Workshop*, April 2008
5. HP Webinar, *The Interdependence of ITIL, ITSM, PM & BA*, April 2008
6. PMI 2008 Rocky Mountain Project Management Symposium, April 2008
7. *Living on the Edge, Managing Project Complexity, 90 Minute Workshop*
8. *Organizational Maturity Assessments*
9. PMI Denver Roundtable, Ball Aerospace, *Living on the Edge: Managing Project Complexity*, April 2008
10. University of Southern Mississippi IT Leadership Team Executive Seminar, April 2008
11. Mid Atlantic Project Summit/ Business Analyst World, April/May 2008
12. *Living on the Edge, Managing Project Complexity presentation*
13. *Top Five Challenges for Senior Business Analysts 1-day Workshop*
14. PMI Denver Roundtable – Quest, *Living on the Edge, Managing Project Complexity*, May 2008
15. IIBA Fort Worth Chapter, *Professionalizing Business Analysis, Breaking the Cycle of Challenged Projects*, May 2008
16. PMI Denver Roundtable, Coors, *Living on the Edge, Managing Project Complexity*, May 2008
17. *Business Analyst World Symposium Series, Denver Professionalizing Business Analysis*, June 2008
18. IIBA Silicone Valley Chapter, *The Business Analyst: The Pivotal IT Role of the Future*, June 2008
19. China Webinar, *Building a PMO to Last*, June 2008
20. *Regional Project World & World Congress of Business Analysis*, June 2008
21. *The Business Analysis Center of Excellence, The Cornerstone of Business Transformation 1-day workshop*
22. *Organizational Business Analysis Maturity Assessments, a CCM Appraisal of BA Practices*
23. IIBA Denver Chapter, *Business Analyst as Facilitator*, July 2008
24. IIBA Dallas Chapter, *The Business Analyst: The Pivotal IT Role of the Future*, May 2008
25. *Harness the BA/PM Partnership Webinar*, July 2008
26. Cisco BA Forum, *The Business Analyst, The Pivotal IT Role of the Future*
27. *Project Summit/BA World – Fall Conference in San Francisco, Professionalizing Business Analysis, Breaking the Cycle of Challenged Projects*, October 2008
28. IIBA Silicon Valley, East Bay and Sacramento Chapters Joint Chapter Event at Project Summit/BA World, – Fall Conference in San Francisco Palo Alto CA, *The Business Analyst and IIBA – What’s in it for me?* October 2008.
29. PMI Global Congress, *The Project Management Center of Excellence, The Cornerstone of Business Transformation*, October 2008

2007

1. PMI LA Chapter, *From Strategy to Results, Portfolio Management*, April 2007
2. Denver PMI 2007 Rocky Mountain Symposium, *Leading Complex, High-Risks Projects*, April 2007
 - *Project Summit/BA World, Washington DC, April 2007. Professionalizing Business Analysis, Breaking the Cycle of Challenged Projects, Improve Your Business Analysis Performance, Five Challenges for Senior Business Analysts, (1-day workshop)*
3. PMI, Minneapolis, MN, *Business Case Development (1-day workshop)*, May 2007

4. PMI Atlanta PDD 2007, Living on the Edge, Project Complexity Management, Atlanta, GA, August 2007
5. PMI 2007 Northern California Fall Symposium, San Francisco, Harnessing Project Complexity, *Applying Complexity Thinking to Manage High-Risk Projects*, September 2007
6. Fairfax County Public Schools Leadership Team Executive Seminar, September 2007
7. PMI Global Congress, Living on the Edge, Project Complexity Management, Atlanta GA, October 2007
8. Project Summit / BA World, San Francisco, October 2007. Living on the Edge, *Applying Complexity Thinking to Manage High-Risk Project*, Professionalizing Business Analysis, *Breaking the Cycle of Challenged Projects*, Top Five Challenges for Senior Business Analysis (1-day workshop)
9. Project Summit / BA World, Boston, October 2007. Living on the Edge, *Applying Complexity Thinking to Manage High-Risk Projects*, Professionalizing Business Analysis, *Breaking the Cycle of Challenged Projects*, Top Five Challenges for Senior Business Analysis (1-day workshop)
10. Project Summit / BA World, Chicago, November 2007. Living on the Edge, *Applying Complexity Thinking to Manage High-Risk Projects*, Professionalizing Business Analysis, *Breaking the Cycle of Challenged Projects*, Top Five Challenges for Senior Business Analysis (1-day workshop)
11. IIBA Washington DC Chapter, BA Center of Excellence, *The Cornerstone of Business Transformation*, December 2007
12. PMI Washington DC Chapter, Living on the Edge, *Applying Complexity Thinking to Management High-Risk Projects*, December 2007

2006

1. PMI Rochester Chapter Professional Development Day, Rochester, NY, The Business Analyst, The Pivotal IT Role of the Future, May 4, 2006
2. PMI Denver 2006 Symposium, Denver CO, Project Management Maturity Assessment, *A CMM Appraisal of Project Management Capabilities*, May 2006
3. Project Summit and Business Analyst World, Arlington VA, Harnessing the Power of Professional Business Analysis Workshop, June 2006
4. Project Summit and Business Analyst World, Arlington VA, Professional Business Analysis, *Breaking the Cycle of Challenged Projects*, June 2006
5. Federal Executive Board Professional Development Series, Leadership in a Project Environment, July 2006
6. Los Padres, CA PMI Chapter, From Strategy to Action, *Enterprise Portfolio Management*, August 2006
7. PMI Global Congress, North America, Seattle WA, Improving Projects with Business Analysis Micro-seminar, October 2006
8. PMI Global Congress, North America, Seattle WA, Increasing Project Management Maturity in Your Organization, October 2006
9. ProjectWorld & World Congress for Business Analysts USA. Orlando Florida, Enterprise Analysis: Value-Based Portfolio Management, November 2006

2005

1. ProjectWorld Canada/Business Analysis World Toronto, The Business Analyst, *The Pivotal IT Role of the Future*, May 2005
2. ProjectWorld Canada / Business Analyst World Toronto, Harnessing the Power of the Project Manager and Business Analyst Partnership, May 2005
3. PDS'05 PMI IS SIG Professional Development Symposium 2005, San Francisco, CA, The Business Analyst, *The Pivotal IT Role of the Future*, June 2005
4. SD UML & Design World, Austin, TX, The Business Analyst, *The Pivotal IT Role of the Future*, June 2005
5. PMI Region 14 Seminar/Symposium 2005, Atlanta, GA, From Strategy to Action: *Enterprise Portfolio Management*, June 2005
6. PMI Region 14 Seminar/Symposium 2005, Atlanta, GA, The Business Analyst, *The Pivotal IT Role of the Future*, June 2005
7. PMI Global Congress 2005-North America, Toronto, Canada, The Business Analyst, *The Pivotal IT Role of the Future*, September 2005
8. SD Best Practices Conference and Expo, Boston, MA, The Business Analyst, *The Pivotal IT Role of the Future*, September 2005

9. PMI Mile High Chapter, Denver, CO, Harnessing the Power of the Project Manager and Business Analyst Partnership Workshop, October 2005
10. Project Summit / Business Analyst World, Boston, MA, Harnessing the Power of the Project Manager and Business Analyst Partnership Workshop, October 2005
11. Project Summit / Business Analyst World, Boston, MA, The Business Analyst, *The Pivotal IT Role of the Future*, October 2005
12. Project World & the World Congress for Business Analysts, Orlando, FL, Using Maturity Assessments to Unleash Organizational Capabilities, *A Case Study*, November 2005

2004

1. ProjectWorld, Los Angeles, Organizational Project Management Maturity Assessment - *CMM Based Appraisal of PM Practices*, March 2004
2. PMI Information Systems SIG Professional Development Symposium 2004
Saint Louis, MO, Organizational Project Management Maturity Assessment - *CMM Based Appraisal of PM Practices*, June 2004
3. PMI Pittsburgh Chapter, Pittsburgh, PA, IT Project Quality & Risk Assessments - *A Systematic IT Risk Management Practice*, September 2004
4. ProjectWorld, Washington DC, Organizational Project Management Maturity Assessment - *CMM Based Appraisal of PM Practices*, September 2004
5. PMI Global Congress 2004-North America, Anaheim, CA, Strategically Manage Your Portfolio, Micro-seminar, October 2004
6. 16th Annual International Integrated Program Management Conference, Co-Sponsored by CPM-PMI (College of Performance Management of Project Management Institute), NDIA (National Defense Industrial Association), & SCEA (Society of Cost Estimating and Analysis), IT Project Quality & Risk Assessments - *A Systematic IT Risk Management Practice*, November 2004

2003

1. Sixth Annual Original The Performance Conference, Sponsored by the National Academy of Public Administration, Center for Improving Government Performance, Capital Asset Planning, *Tips, Tricks and Traps*, May 2003
2. Project World Boston, Organizational Project Management Maturity Assessment - *CMM Based Appraisal of PM Practices*, June 2003
3. PMI Global Congress 2003-North America, Enterprise Portfolio Management, Micro-seminar, September 2003, Baltimore
4. Knowledge Exchange Forum, Co-Sponsored by the PMI Washington DC Chapter and Virginia Tech, Project Management Mentoring, *Pathway From Education To Implementation*, October 2003
5. 15th Annual International Integrated Program Management Conference, Co-Sponsored by CPM-PMI (College of Performance Management of Project Management Institute), NDIA (National Defense Industrial Association), & SCEA (Society of Cost Estimating and Analysis), IT Project Quality & Risk Assessments - *A Systematic IT Risk Management Practice*, November 2003

Articles

1. Leadership and Communication Skills for Project Managers, Knowledge Management Online, 2003
2. Five Roles for Team Leaders, A High Performing Team Requires Project Managers to Wear Many Hats, Knowledge Management Online, February 22, 2004
3. Managing Multiple Projects: Transcending Time and Distance, Federal Times, January 2005
4. Virtual Teams Connect Far-Flung Project Managers, Federal Times, February 28, 2005
5. Accidental Project Manager or Strategic Team Leader? Federal Times, May 2005
6. Enterprise Portfolio Management: From Strategy to Action, SBusiness, July 2005
7. Professional Business Analysis, Reducing the Trend of Failed Business Transformation Projects, Project Times, Winter, 2006
8. The Coming of Age of the Business Analyst, Journal of Business Strategy, Spring 2006
9. Why Do So Many IT Projects Fail? Federal Times, August 2006
10. The Critical Business Analyst Role in Agile Projects, Its All About the Value, gantthead.com, July 2006

11. When Failure Is Not an Option: Project Management Training at the CIA, GovPro Newsletter, October 2006 and Government Procurement, December 2006
12. The Five Deadly Sins of Agile Project Management, gantthead.com, October 2006
13. The Five Deadly Sins of Project Start-Ups, Power Magazine, October 2006
14. The Blending of Traditional and Agile Project Management, Project Management World Today, 2007
15. Introducing the Project Complexity Model, A New Approach to Diagnosing and Managing Projects, Project Management World Today, Spring/Summer 2007
16. The Role of the Business Analyst in Agile Project Management, Project Management World Today, Spring/Summer 2007
17. The Business Analyst as Strategist, Business Analyst Times, Spring/Summer 2007
18. An Eye for Value: What the Business Analyst Brings to the Agile Team, BA Times, March 2008
19. Managing Complex Projects Is Not a Simple Matter, PM World Today, March 2008
20. The 21st Century's Perfect Storm: The Transformation of IT, Project Times, September 2008
21. Introducing the Project Complexity Model, The Icfai University Press, September 2008
22. A series of articles: Introducing the Project Complexity Model, Project Times, Fall 2008
23. Business Analysis Center of Excellence, The Journey to Professional Excellence, Modern Analyst Media, May 2009
24. Complex Project Management Trends, Project Times, October 2009
25. BA Proficiency: How capable do I need to be? IIBA Newsletter April 2010
26. The Living Business Case, IIBA Newsletter March 2010
27. Use Virtual Teams as a Competitive Advantage, IIBA Newsletter March 2010
28. Change management Best Practices, PMI Community Post, June 25 2010
29. **2010 Complex Project Management Series based on the 2009 PMI Book of the Year**, Online at Project Times, ModernAnalyst.com, and ProjectAtWork
 - a. Complex Project Management, What's All the Fuss About?
 - b. Complex Project Management: The "Next Big Thing" for Experienced Project Managers
 - c. Managing the Complexities of Projects that are Too Large, Too Long, Too Costly
 - d. Managing the Complexities of Projects that are Large, Diverse Project Teams: The Good, the Bad and the Complexity
 - e. Managing the Complexities of Projects that are Urgent with no Flexibility, Aggressive Scope, Urgent Milestones, Over-Ambitious Schedules
 - f. Managing the Complexities of Projects that have Ambiguous Problem, Opportunity and Solution, and have Undefined, Groundbreaking, Unprecedented Innovative
 - g. Managing the Complexities of Projects that have Requirements Volatility and Risk: Uncertain, Evolving, and Poorly Understood
 - h. Managing the Complexities of Projects that have Strategic Importance, Political Implications, Critical Impacts to the Core Mission of Multiple Organizations
 - i. Managing the Complexities of Projects that Require Large Scale Organizational and Cultural Change: Transformative , Groundbreaking
 - j. Managing the Complexities of Projects that are High Risk with Multiple External Constraints, Unprecedented Integration Needs
 - k. Significant IT Complexity: Unprecedented Engineering Accomplishments; Systems of Systems
30. The 21st Century BA: ***From Tactical Requirements Manager to Creative Leader of Innovative Change***, BATimes and ModernAnalyst.com, 2012
 - a. Article #1: It's a New World for the BA: We need to Grow up Fast!
 - b. Article #2: The Adaptive Business Analyst: As Complexity Increases, the BA Adapts
 - c. Article #3: Creative Leadership: What's All the Fuss About?
 - d. Article #4: How Capable Do Business Analysts Need to be to Ignite Creativity?
 - e. Article #5: Building a Mature, Innovation-Driven Business Analysis Practice
 - f. Article #6: Fostering Team Creativity: The Business Analyst's Sweet Spot
 - g. Article #7: Igniting Creativity in Complex Distributed Teams
 - h. Article #8: Creativity-Inducing Facilitation: the Same but Different
 - i. Article #9: Creatively Eliciting and Evolving Breakthrough Requirements
 - j. Article #10: Developing Products for Competitive Advantage
 - k. Article #11 Strategies to Foster Innovation: not settling for Business as Usual
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- m. Article #13: Innovation-Driven Portfolio Management
 - n. Article #14: The Business Analysis Center of Excellence: The Cornerstone of Business Transformation and Innovation
31. ***The BA Practice Lead Handbook***, a series of articles appearing on the BATimes website throughout 2013.
- a. Why Business Analysis? Presenting the case for Business Analysis
 - b. Getting Organized: What structure is right for you during the start-up phase?
 - c. Will the Real Business Analysts please stand up - take Inventory of the BA Community.
 - d. What is the current state of your BA Practices? Assess:
 - e. What is the current state of the capabilities of your BA Workforce?
 - f. What is Your Vision? What does a successful BA Practice look like?
 - g. Do I need a BA Center of Excellence?
 - h. How do I Spread the Word? Marketing and branding your BA capability.
 - i. How do I gain and sustain confidence and credibility in the BACOE and BA Workforce?
 - j. How do I begin working at the Enterprise level?
 - k. How do I demonstrate Value? Implementing a Metrics and Measurements Program
 - l. Conduct an annual evaluation of the BA Practice
 - m. Building a world class BA Practice – putting it all together