

Business Consultant – Roles & Responsibilities

Envigo

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Table of Contents

BUSINESS CONSULTANT	4
ROLE TASKS	4
SCOPE	4
REQUIREMENT GATHERING	4
SPRINT MANAGEMENT	5
DOCUMENTATION AND DECISION MAKING	5
INTERNAL STAKEHOLDER MANAGEMENT	6
CUSTOMER MANAGEMENT	6
COMPETENCY LEVEL	7
LEVEL 1 - COMPETENCY REQUIRED	7
LEVEL 1 - PERFORMANCE MANAGEMENT GOALS	8
LEVEL 1 - GOALS – BUSINESS OUTCOME	9
LEVEL 2 - COMPETENCY REQUIRED	9
LEVEL 2 - PERFORMANCE MANAGEMENT GOALS	10
LEVEL 2 - GOALS – BUSINESS OUTCOME	11
LEVEL 3 - COMPETENCY REQUIRED	11
LEVEL 3 - PERFORMANCE MANAGEMENT GOALS	12
LEVEL 3 - GOALS – BUSINESS OUTCOME	13
NEXT STEPS	13
PERFORMANCE REVIEW	13

BUSINESS CONSULTANT

ROLE TASKS

SCOPE

Work involves coordinating the gathering, development, and documentation of user requirements. The review, assessment, and development of business processes. The creation and validation of user stories and acceptance criteria.

Has sound knowledge of the industry best practices with respect to software product development (including user experience) and good know how on the customer industry specific compliance requirements

May supervise the work of others. Expected to take up ownership and take actions without any supervision.

REQUIREMENT GATHERING

- Go prepared for the requirements gathering meeting – Read through the required documents and analyze open-ended queries before attending the meeting.
- Conduct research and analysis on the business domain and you should be the subject matter expert for the customer during requirement elicitation.
- Document requirements - Once you gather the requirements, make sure you document them in a concise and well-organized format in an organization defined template.
- Once the requirements are documented, share documents with all stakeholders to ensure everybody is on the same page before the project begins. If anything was skipped or misunderstood, it's better to know early.
- Do regular workshops with the team to plan and discuss the requirements. Should be able to convey the business objectives to the stakeholders and the team effectively
- Make sure you get the approval on the wireframes and user stories with minimum feedback from the client.
- Should be able to analyze the impact of change requests from the client on the existing system articulate the business reasons why these changes are coming so that the team embraces the change positively.
- Should be able to mitigate the requirement risk, if the client comes up with an ad hoc requirement.
- Don't always say Yes to all client requirements. If something is not feasible (after consulting with the technical team), convince the client with proper documents, data/statistics and

provide alternate solutions. Should be able to negotiate effectively with the client and should have the patience to convince them to adopt your suggestions.

- Be a good listener - Understand the perspective of the user and be a good listener during requirements gathering meetings.

SPRINT MANAGEMENT

- Write effective user stories – The user stories must be simple and easy to understand. Acceptance criteria must avoid ambiguity as to what the expected outcome is.
 - Make sure the user stories have all the scenarios covered
 - Make sure less time is spent in explaining the user stories to the developers
- Prioritize product backlog – Prioritize the items in the product backlog according to business objectives and overall go to market strategy.
- Always be ready with the plan for the next 2 sprints. For Fixed Price Project recommend to have clarity until first release.
- Conduct sprint grooming sessions at least once every sprint. Make sure the backlog is up to date, stories are prioritized and prepare the team for upcoming sprints.
- Taking an overview of development stages: Oversee the development of the product through all stages of the sprint. Make sure all the sprint ceremonies are followed:
 - Sprint Planning
 - Daily Stand-Up
 - Sprint Review
 - Sprint Retrospective
- Should be able to manage the sprint in the absence of PMO/Scrum Master

DOCUMENTATION AND DECISION MAKING

- Create scope documents as part of pre-sales activities.
- After every client meeting, MOM (minutes of meeting) to be circulated within the stakeholders. The MOM should contain all the points discussed in the meeting, along with the action item and its ownership.
- Translate all action items into Jira (or any project management tool) or any document and monitor the status of the task.
- Track the progress of the project and document every change request that has occurred during the project lifecycle.

- Know the technical and industrial compliances and policies while developing a product. (e.g GDPR, HIPPA, Data Privacy, Apple and Google Guidelines etc.)
- While finding a solution, assess the situation, do the research, discuss with the team on potential solutions, analyze the solutions and decide on the best solution
- A sound understanding of features and limitations of relevant 3rd Party / SAAS products that is being used in the product development (eg. DocuSign)
- Identify and Provide Relevant Marketing Content for Envigo Marketing Team.

INTERNAL STAKEHOLDER MANAGEMENT

- Know your team well and provide guidance and support to the team members by understanding their requirements or pain points. By becoming a more effective communicator, you'll remove confusion among your team and ensure everyone is aligned and working toward the same goals.
- Keep the team updated with all the requirements, change requests, any kind of information from the client.
- Make your team feel comfortable approaching you when they have questions or concerns, or when they need clarification on what's expected of them.
- Ensure every team member willingly participates in team discussions. The team members must be motivated on a regular basis.
- Share the best practices and learnings to entire organisation.

CUSTOMER MANAGEMENT

- Know your customer well. Maintain good rapport with your customer.
- Understand the vision/interest of the customer and get the deliverables planned accordingly. For example, if the customer is more interested in UI/UX than the functionality, instruct the team to focus more on the UI/UX perspective and vice versa.
- Raise risks / issues with clients upfront. Do not wait for the client to find the issue and report back to us.
- Frequently take feedback from customers and keep them updated on the feedback status.
- Response to client mail/chat with priority

PROCESS ADHERENCE

- Proactively inform the leaves and availability of the line manager and it should be planned well and applied upfront in HRone. Inform the same PM if you are in an emergency situation
- Maintain 40 Hrs and clock the efforts to the Time Management tool accurately and on time.

COMPETENCY LEVEL

Star 1	The resource who knows the Basic Knowledge about Business Analysis or other skills.
Star 2	The resource who knows the Basic Knowledge about Business Analysis or other skills. Who can perform/execute the business analysis tasks with the help of a senior person.
Star 3	The resource who knows the Basic Knowledge about Business Analysis or other skills. Who can perform/execute the business analysis tasks without the help of others.
Star 4	The resource who knows Thorough Knowledge about Business Analysis or other skills. Who can perform/execute the business analysis tasks using best BA practices. Who can help others to perform/execute BA activities, and review/suggest the analytic methods and practices.
Star 5	The resource who knows Thorough Knowledge about Business Analysis or other skills. Who can perform/execute the business analysis tasks using best BA practices. Who can help others to perform/execute BA activities, and review/suggest the analytic methods and practices. Who can define the best practices and approaches to guide the team members. Who should have a piece of good knowledge of product domain and technical aspects.

LEVEL 1 - COMPETENCY REQUIRED

Iceberg Elements	Competency Attributes List (Weightage)
Skills (Proficiency)	- Effective Communication (3) - Strong persuasive verbal communication and exquisite written skills in English - Listening Skills (3) - Analytical & Critical Analysis (3) - Knowing the Objectives Well - Approach challenges in a consistent and systematic way - Problem Solving Skills (3) - Analyze the problem, identify the root cause, develop alternate solutions, implement the right solution - Management & Leadership (1) - Charismatic Leader and able to influence behavior of the team in a positive way

	○ Provide guidance, advice, feedback and support to the mentee
Knowledge (Proficiency)	1. Technical Knowhow (3) ○ A good understanding of the latest technologies and 3rd party integration that can be used and its limitations. 2. User Experience Design (3) ○ A good understanding of concepts and latest trends on the user experience 3. Analytical thinking (3) ○ Business analysts should be able to analyze complex data, identify trends and patterns, and make informed decisions based on data-driven insights. 4. Industry and Domain Knowledge (3) ○ Good knowledge of the inner workings, processes, procedures and other key aspects of the product or domain 5. BA Tools (4) ○ MIRO ○ Figma ○ Jira 6. Project Management Best Practices (3) ○ Good understanding of Best Practices of Product Development, IT Industry and Agile Process ○ Resource Management and Utilization ○ Scope Control Process
Self-Image (Perspective)	1. Confident and Passionate 2. Empathetic and a people person 3. Enjoys getting into minute details.
Traits (Perspective)	1. Good Listener 2. Patience 3. Adaptability - Willingness to learn and adapt in fast paced environment 4. Positive Attitude and continue to see the good side of the team. 5. Accept Failures and Take Lessons 6. Empathic 7. Honest 8. Approachable and Friendly
Motives (Perspective)	1. Make a Difference 2. Delivery Values - Finds joy in impacting lives of people and organization in a positive way. 3. Finds satisfaction in taking up challenges and executing them 4. Passionate about growth by helping organization to achieve its goals

LEVEL 1 - PERFORMANCE MANAGEMENT GOALS

Goals are categorized into 3 sections

Category	Details	Weightage
Business Outcome	Goals Defined below in detail.	70%
Proficiency	Showcase growth in Knowledge and skills This will be done in the Skills-Base Tool. You would do self-assessment and for the given role we will have a desired level of competency against each skill and knowledge.	15%
Perspective	Your Attitude and Traits are assessed by 360 Degree Feedback. We'll take a cross section of your direct team, your manager, your peers and dotted lined employees to get feedback. This would be part of the appraisal life cycle.	15%

LEVEL 1 - GOALS – BUSINESS OUTCOME

Category	Weightage100	Weightage70	Details
Requirement Gathering	30%	20%	Individual Detailed KPIs would be derived from the role sheet
Sprint Management	20%	13%	
Documentation and Decision Making	30%	20%	
Internal Stakeholder Management	10%	6%	
Customer Management	10%	6%	
Process Adherence		5%	

LEVEL 2 - COMPETENCY REQUIRED

Iceberg Elements	Competency Attributes List (Weightage)
Skills (Proficiency)	- Effective Communication (4) - Strong persuasive verbal communication and exquisite written skills in English - Listening Skills (4) - Analytical & Critical Analysis (4) - Knowing the Objectives Well - Approach challenges in a consistent and systematic way - Problem Solving Skills (3) - Analyze the problem, identify the root cause, develop alternate solutions, implement the right solution - Management & Leadership (2) - Charismatic Leader and able to influence behavior of the team in a positive way - Provide guidance, advice, feedback and support to the mentee
Knowledge (Proficiency)	- Technical Knowhow (3) - A good understanding of the latest technologies and 3rd party integration that can be used and its limitations. - User Experience Design (4) - A good understanding of concepts and latest trends on the user experience - Analytical thinking (4) - Business analysts should be able to analyze complex data, identify trends and patterns, and make informed decisions based on data-driven insights. - Industry and Domain Knowledge (3)

	○ Good knowledge of the inner workings, processes, procedures and other key aspects of the product or domain 5. BA Tools (4) ○ MIRO ○ Figma ○ Jira 6. Project Management Best Practices (3) ○ Good understanding of Best Practices of Product Development, IT Industry and Agile Process ○ Resource Management and Utilization ○ Scope Control Process
Self-Image (Perspective)	1. Confident and Passionate 2. Empathetic and a people person 3. Enjoys getting into minute details.
Traits (Perspective)	1. Good Listener 2. Patience 3. Adaptability - Willingness to learn and adapt in fast paced environment 4. Positive Attitude and continue to see the good side of the team. 5. Accept Failures and Take Lessons 6. Empathic 7. Honest 8. Approachable and Friendly
Motives (Perspective)	1. Make a Difference 2. Delivery Values - Finds joy in impacting lives of people and organization in a positive way. 3. Finds satisfaction in taking up challenges and executing them 4. Passionate about growth by helping organization to achieve its goals

LEVEL 2 - PERFORMANCE MANAGEMENT GOALS

Goals are categorized into 3 sections

Category	Details	Weightage
Business Outcome	Goals Defined below in detail.	70%
Proficiency	Showcase growth in Knowledge and skills This will be done in the Skills-Base Tool. You would do self-assessment and for the given role we will have a desired level of competency against each skill and knowledge.	15%

Perspective	Your Attitude and Traits are assessed by 360 Degree Feedback. We'll take a cross section of your direct team, your manager, your peers and dotted lined employees to get feedback. This would be part of the appraisal life cycle.	15%
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LEVEL 2 - GOALS – BUSINESS OUTCOME

Category	Weightage 100	Weightage 70	Details
Requirement Gathering	25%	17%	Individual Detailed KPIs would be derived from the role sheet
Sprint Management	20%	13%	
Documentation and Decision Making	25%	16%	
Internal Stakeholder Management	10%	6%	
Customer Management	20%	13%	
Process Adherence		5%	

LEVEL 3 - COMPETENCY REQUIRED

Iceberg Elements	Competency Attributes List (Weightage)
Skills (Proficiency)	- Effective Communication (4) - Strong persuasive verbal communication and exquisite written skills in English - Listening Skills (5) - Analytical & Critical Analysis (4) - Knowing the Objectives Well - Approach challenges in a consistent and systematic way - Problem Solving Skills (4) - Analyze the problem, identify the root cause, develop alternate solutions, implement the right solution - Management & Leadership (3) - Charismatic Leader and able to influence behavior of the team in a positive way - Provide guidance, advice, feedback and support to the mentee

Knowledge (Proficiency)	1. Technical Knowhow (3) ○ A good understanding of the latest technologies and 3rd party integration that can be used and its limitations. 2. User Experience Design (4) ○ A good understanding of concepts and latest trends on the user experience 3. Analytical thinking (4) ○ Business analysts should be able to analyze complex data, identify trends and patterns, and make informed decisions based on data-driven insights. 4. Industry and Domain Knowledge (4) ○ Good knowledge of the inner workings, processes, procedures and other key aspects of the product or domain 5. BA Tools (5) ○ MIRO ○ Figma ○ Jira 6. Project Management Best Practices (3) ○ Good understanding of Best Practices of Product Development, IT Industry and Agile Process ○ Resource Management and Utilization ○ Scope Control Process
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Motives (Perspective)	1. Make a Difference 2. Delivery Values - Finds joy in impacting lives of people and organization in a positive way. 3. Finds satisfaction in taking up challenges and executing them 4. Passionate about growth by helping organization to achieve its goals

LEVEL 3 - PERFORMANCE MANAGEMENT GOALS

Goals are categorized into 3 sections

Category	Details	Weightage
Business Outcome	Goals Defined below in detail.	70%
Proficiency	Showcase growth in Knowledge and skills This will be done in the Skills-Base Tool. You would do self-assessment and for the given role we will have a desired level of competency against each skill and knowledge.	15%
Perspective	Your Attitude and Traits are assessed by 360 Degree Feedback. We'll take a cross section of your direct team, your manager, your peers and dotted lined employees to get feedback. This would be part of the appraisal life cycle.	15%

LEVEL 3 - GOALS – BUSINESS OUTCOME

Category	Weightage 100	Weightage 70	Details
Requirement Gathering	20%	13%	Individual Detailed KPIs would be derived from the role sheet
Sprint Management	20%	13%	
Documentation and Decision Making	20%	13%	
Internal Stakeholder Management	20%	13%	
Customer Management	20%	13%	
Process Adherence		5%	

NEXT STEPS

If you are reading this for the first time, We recommend you take a Self-Assessment to understand where you stand according to this expectation by talking to your HR SPOC.

PERFORMANCE REVIEW

Category	Tool	Responsible	Details
Business Outcome	HRONE	Goals would be divided to multiple people for Review e.g. HR Related Goals would be HR Manager	Self-Evaluation from Sep 1 to Sep 15 Mar 1 to Mar 15 Review Session would be scheduled by HR SPOC/Manager. Meeting will include 1. Reporting Manager 2. Business Analyst - Head 3. HR SPOC (Optional) All concerned reviewers should have the ratings done and ready before the meeting. We assess together as to why these ratings and come to a consensus. 30 Minute Meeting.
Proficiency	Skills Base	Reporting Manager Technology COE RTC	Self-Assessment from Sep 1 to Sep 15 Mar 1 to Mar 15 Rating Directly taken from the Skills-base
Perspective	Survey Sparrow	Peers, Dotted Line Manager, Direct Reportees	This would be conducted from Sep 1 to Sep 15 Mar 1 to Mar 15 Rating Directly taken from the 360-degree tool.