

David P Jacobs BSc Hons, MBCS, BVMS

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- Versatile, SC cleared **Senior Business Analyst** with more than 25 years in business analysis and 40 plus years in IT and business and digital transformation
- Former marketing information analyst, researcher and computer/IT programmer, also now work as **project leader, deputy/assistant/stand-in project manager, business value, success and ROI maximisation specialist and project rescue/recovery/turnaround practitioner/troubleshooter**
- Thought-leading high-achiever, with strong reputation for delivering significant strategic, tactical and operational business value, success and return on investment (ROI)
- Extensively experienced in many business and IT environments having worked in a variety of contract, permanent and consultancy capacities specialising in front & back-office processes
- Specialities include scope definition, business case development, feasibility studies, project initiation (PID), stakeholder management, requirements gathering & management, gap analysis, business process analysis/modelling/reengineering, target operating model (TOM) definition, data analysis/modelling and migration/ETL, software product (COTS) selection, dealing with 3rd party suppliers, user acceptance testing (UAT), training, mentoring and coaching, business-IT alignment and mediation, facilitation of workshops, meetings and initiatives
- Highly articulate communicator and effective mediator between IT and other/business departments
- Systematic approach with great attention to detail *and* taking the bigger picture into account
- Professional Member of and mentor for the British Computer Society (BCS) and its Project Management Group (PROMS-G), holder of BCS Certificates in Business Analysis (2016) and Modelling Business Processes (2016), member of and mentor for the International Institute of Business Analysis (IIBA UK) and a European Mentoring and Coaching Council (EMCC) Affiliate

ATTRIBUTES

Experienced/expert in: Waterfall, Software Development Life Cycle (SDLC), value, success and ROI maximisation with Business Value Maximisation Framework (BVMF®), Relational Database Management Systems (RDBMS), Structured Query Language (SQL) per Sybase, SQL Server and Oracle, MS Office, Visio, Business Intelligence/Insight (BI), management information (MI), data marts/warehousing, MS Dynamics 365, business process reengineering (BPR), business & digital transformation

Good knowledge of: Agile, Dynamic Systems Development Method (DSDM), PRINCE2, Axelos Best Practice, ERP, CRM, Managing Successful Programmes (MSP), Business Process Modelling Notation (BPMN), Procurement: OJEU/RFI/RFP, Benefits Realisation Management (BRM), Management of Value (MoV), Change Management, UML/Use Cases, Lean Six Sigma, Student Record Systems (SRS): Banner, QL, SITS and Ellucian, Confluence, Triaster, MS Teams, Access, Project and SharePoint, Business Process Management (BPM), workflow, draw.io, LucidChart, HTML, Primavera, BABOK, Capability Maturity Model Integration (CMMI), Conference Room Pilots (CRP), Systems Thinking, FSI Concept, APIs, OpenText's Documentum case and document management, Azure DevOps, GDPR/DPA/GDS, Power BI, Jira, Confluence, Life Cycle Management (LCM), Salesforce, ServiceNow service management, OOAD, Rational Unified Process (RUP) by Rational, DOORS

Broad industry experience: worked in private *and* public sectors including banking, insurance, pensions, universities, education, airports, airlines, aviation, air cargo, defence, the Post Office, payroll and charities

Adept communicator and mediator: used to operating at all levels, from director/senior stakeholder to office/shop floor and from small companies to large corporations. Excellent at translating technical concepts for non-technical audiences and effectively conveying business needs to IT thus 'bridging the gap' all/both ways

Successful thinker outside the box: takes a holistic, big picture, original and creative approach combined with strong analytical skills *and* focus on detail. Quick to see opportunities to use methods to best effect. Knowledgeable about professional and personal performance and leadership techniques. Highly practical and pragmatic. Have created many own techniques to enhance conventional IT/project methods to produce high levels of value, success and return on investment (ROI)

CAREER

11/2023 - Present **Senior Business Analyst** **Quilter Wealth Management**

- Having worked on the Wealth Management Transformation (WMT) CRM programme, now working on the Business Channel Optimisation (BCO) programme as part of Change, producing and reconciling business

and project/programme processes, functions, data, requirements and other artefacts in an agile/Scrum project environment using MS Dynamics 365 CRM, Jira, SharePoint, Business Optix and other IT systems

- Supervising business analysis (two other BAs) on the BCO programme, supporting the project/programme managers with oversight and coordination and leading the business analysis for the hub transformation sub-programme and its projects
- Acting as member of the Agile Task Force helping lead Change through optimal adoption of agile practices
- Achievements: supported project & programme teams with high-quality analysis and documentation of best project & requirements approach, artefact standards, use of Jira, intelligent RAID log, glossary, etc.

03/2022 - Present Business Analyst/Value Maximisation Specialist/Dir. MaxVal Consultancy

- Leading an ongoing research and development programme, started in the 1990s, into the maximisation of IT business value, success and return on investment (ROI); authoring, presenting, training and consulting and speaking on the subject for the International Institute of Business Analysis (IIBA) UK
- Upgrading skills, knowledge, qualifications and capabilities in business analysis and project management
- Achievements: have made several presentations for the International Institute of Business Analysis (IIBA) UK on my Business Value Maximisation Framework (BVMF®) and have coached and mentored several business analysts and other IT professionals into better career positions and skill sets

01/2023 - 06/2023 Business Analyst BAE Systems

- As a member of the Enterprise IT Project & Portfolio Management's business analysis and change team, supported the International Portfolio's Air division with requirements definition, management and deployment using LCM (Lifecycle Management), Jira, Confluence and other tools working with personnel from third party supplier DXC Technology
- Achievements: acted as the requirements glue between the project teams, accurately managing, processing, updating and tracing eight hundred requirements through testing to functional satisfaction

03/2021 - 01/2023 Business Analyst/Functional Consultant The Pensions Regulator (TPR)

- Led and participated in the formulation and deployment of COTS based enforcement case and document management systems and associated business processes for manual and automatic bulk case processing
- Supported the Auto Enrolment programme with analysis and design of IT systems (Business As Usual (BAU), Continuous Improvement (CI) and new) and associated processes using MS Dynamics 365 CRM with SQL Server, Documentum and other, mainly COTS based, software platforms
- Reviewed proposed handover parameters of third party Capita with reference to service management, support and verification of documentation and management procedures advising management of results
- Produced business case/s, requirements, process and data models, test and implementation plans, coordinating design and development teams, architects, database teams, support and service management, project management and senior business users/stakeholders for optimal outcomes for several hundred user case management professionals
- Designed and implemented new processes to address business project needs with maximum efficiency and effectiveness e.g., a new prioritisation algorithm for Azure DevOps backlog item evaluation and scheduling; also a new user onboarding process for manual case managers using ServiceNow functionality
- Mentored and coached team members in IT and the business to maximise effectiveness of their roles, career progression and business value for them, their colleagues and beneficiaries of systems and processes deployed, i.e., more than 22 million UK pension holders and savers
- Submitted ideas and suggestions for greater effectiveness and productivity voluntarily leading the projects selected for progression and implementation such as a comprehensive survey of 200+ manual case management users and an MS Teams Chat Retention Review exercise to help 1,000 employees of TPR
- Ran workshops and meetings to formulate system and process fixes, guiding and coordinating teams to design, deploy and implement the fixes, systems and processes, all subject to GDPR, DPA and GDS
- Made presentations to bring about better systems and processes such as optimal IT-business work practice, best use of waterfall, agile, 'wagile'/hybrid and other methods, presenting the history of IT business value and the use of communities of practice (CoPs) for engendering best practice for business analysis and project management
- Voluntarily coordinated and galvanised attendance at and participation in Government/Civil Service ICT conferences, participating internally as Enterprise Change Champion and Employer Forum Representative
- Helped assess new COTS/software products undertaking research and arranging demonstrations
- Achievements: engendered demonstrable improvements in effectiveness and efficiency of BAU, CI and project procedures for TPR's case management systems and processes, personally supporting team members and helping the eventual internal and external user experience to be of much higher quality thus benefitting 1,000 users and over 22 million savers/pension holders

02/2020 - 02/2021 Business Analyst/Project Lead Queen Elizabeth's Foundation (QEF)

- Migrated data from MS Access to SQL-Server and business processes from Access to Dynamics 365 CRM

- Conducted ETL using MS Access utilities, SQL (with SQL Server Management Studio) and Excel
- Created business process models, functional requirements and design proposals for Dynamics CRM
- Evaluated and used tools like SQL Server Import Wizard for data migration and Power BI for reporting
- Led resolution of process, function, technical and customisation issues with 3rd party IT supplier
- Supported in-house staff (IT and business) with mentoring, guidance and options analysis
- Documented all procedures created, produced project status report and detailed implementation plan to support migration of business processes to Dynamics 365 CRM
- Achievements: conducted successful data migration from MS Access to a SQL Server archive and provided management with detailed project documentation to enabled them to select the best new system for their disability transport department

01/2017 - 12/2019 Business Analyst/Value Maximisation Specialist/Dir. Maximum Value

- Undertook self-directed professional research and development programme extensively upgrading business analysis, project management and value, success and ROI maximisation qualifications and skills
- Obtained accreditation in Agile business analysis from APMG via Knowledge Academy
- Continued to research and develop Business Value Maximisation Framework (BVMF®)
- Achievements: significantly upgraded skills and qualifications in business analysis especially with respect to use of agile and IT business value, success and ROI maximisation

07/2016 - 09/2016 Business Analyst - Insight British Airways

- Evaluated business requirements for Air Cargo traffic statistics producing Oracle SQL scripts for International Airlines Group (IAG) merger (of BA, Aer Lingus & Iberia) to show cargo traffic by airline capacity, revenue and cost
- Achievements: developed several extensive SQL scripts that manifestly showed trends of BA's air cargo flows not previously visible or evident

05/2015 - 06/2015 Business Analyst/Consultant National Australia Bank (NAB) via Huntswood

08/2014 - 03/2015 Business Analyst Allianz Insurance

03/2014 - 06/2014 Business Analyst School of Oriental and African Studies (SOAS) University of London (Library)

03/2013 - 10/2013 Business Analyst Royal Holloway University of London (Admissions)

02/2012 - 02/2013 Business Analyst - Business Case/Feasibility Studies the Post Office

09/2011 - 11/2011 Business Analyst/Consultant Canterbury Christchurch University Registry/Corporate IT via Watt Works Consultancy

06/2011 - 09/2011 Business Analyst - Target Operating Models Barclays Retail UK

06/2011 - 06/2011 Business Analyst/Consultant Canterbury Christchurch University Sports Centre via Watt Works Consultancy

03/2011 - 05/2011 Business Analyst/Consultant BAA Heathrow via Atkins

11/2010 - 02/2011 Business Analyst Lloyds TSB

2010 - 2011 Business Analyst/Consultant Woking and Sam Beare Hospices (WSBH)

2010 - 2010 Business Process Analyst/Consultant ADP Employer Payroll Services via Maximum Value

2009 - 2010 Business Analyst Gatwick Airport

2008 - 2009 Business Analyst/Consultant Westminster University Estates and Facilities via Project Doctors/PPME

2007 - 2008 Business Analyst - Change Royal Bank of Scotland (RBS)

2006 - 2007 Business Process Consultant/Lead BPP Professional Education

1997 - 2006 Business Analyst - Process, Data, Requirements, Test, Implementation for Fujitsu, Cisco, Vodafone, Ordnance Survey, Teletext, Hereford & Worcester Chamber of Commerce, More Group/Clear Channel, Barclays, Air Products plc

1981 - 1997 4GL and RDBMS Analyst/Programmer and Deputy Project Manager for Worldcom, Sun Microsystems, Walt Disney, Prudential, Uniface Int'l, Pet Plan Insurance, British Gas, Performing Right Society (PRS), Ellert Retail (Merchandising)

Prior to 1985 Marketing Information, Analysis and Research Consultant (mainly air cargo)

1990 - 2023 Concurrent with the above, founded David Paul Jacobs Ltd that became Profit from Information Ltd (1996) to research, develop, propagate improved gap bridging and IT business value, success and ROI maximisation skills and structures.

This morphed to **Maximum Value Ltd** (2010), **Do IT Better Consortium (DIBC)** (2014), **MaxVal Analysis** (2019) and **MaxVal Consultancy Ltd** (2022)

HIGHER EDUCATION, LANGUAGES, COURSES AND EVENTS

Education: BSc Hons, Management Science - Warwick University (Business School), 1976
Languages: French (A level); Spanish (O level); Hebrew (basic); Dutch (basic); Italian (basic)
Courses: Data Modelling for Business Analysts - Assist Knowledge Development, 2015
Public Speaking Certificate - A Harrington's Public Speakers University (PSU), 2022
Events: Have attended and participated in many conferences, events, seminars and webinars on business analysis, business/IT methods, professional performance and project management

VALUE, SUCCESS AND ROI FOCUSED BUSINESS ANALYSIS AND PROJECT MANAGEMENT

1993 - 2023

Headed up an IT Business Value Maximisation Research & Development Programme consequently authoring Business Value Maximisation Framework (BVMF®); see www.Maximum-Value.co.uk

Continue to write, speak, present, mentor, coach and train business analysts and other key roles in business IT, online and in person, in the principles of value and success maximisation arising from this R&D programme

1995 - 2023

Authored published articles on maximising IT business value; see <https://www.maximum-value.co.uk/about.html>

The most recent articles, on successful business analysis, value generation and entrepreneurship, published in 2023 by Brainz Digital Magazine, are listed at [Read more from David!](#)

2000 - 2012

Presented on business analysis and IT value maximisation for industry bodies including the British Computer Society's Project Management Group (BCS PROMS-G), the National Computing Centre (NCC)'s senior users' group, the Post Office's business analysis team and the Association of Project Management (APM); see, for example, <https://www.maximum-value.co.uk/assets/apm.pdf>

2001 - 2018

Contributed to book Failsafe IS Project Delivery by Andrew Holmes, pub. by Gower, reprinted 2017/18

2014 -2023 Founded and ran Do IT Better Consortium (DIBC) to provide higher grade value-focused services in business analysis, project/programme management and business/systems architecture to client organisations; see www.DoITBetterConsortium.co.uk

July 2020 Presented webinar to members of the International Institute of Business Analysis (IIBA) UK on practical, value-focused business analysis; see www.iibauk.org/pastevents/521-virtual-practical-pragmatic-value-focused-business-analysis [link temporarily non op.]

Attendee said "Really good presentation at a time when value is topical. Interesting, and given us food for thought."

September 2022 Presented webinar to members of the International Institute of Business Analysis (IIBA) UK on IT Value Maximisation For Business Analysts Using BVMF®; see <https://www.iibauk.org/pastevents/1164-virtual-it-value-maximisation-for-business-analysts-the-journey-a-the-elephant> [link temporarily non op.]

November 2022 Recorded a podcast for CxOs and business leaders on IT business value maximisation; listen on Spotify at <https://open.spotify.com/episode/5GZmLiZSjje4MKzvbz5U9Q>

August 2023 Presented webinar to members of the International Institute of Business Analysis (IIBA) UK entitled "A Closer Look At The Elephant (Part I)" focusing on basic principles of IT business value, success and ROI maximisation using BVMF®; see <https://www.iibauk.org/pastevents/1287-virtual-august-virtual-event> [link temporarily non op.]

Attendees said "Excellent session - loved the presenter's style, easy to listen to, knowledgeable, empathetic and fun.", "Genuinely valuable content.", "Great message delivered with great energy. Thank you."

January 2024 Presented webinar to members of the International Institute of Business Analysis (IIBA) UK entitled "A Closer Look At The Elephant (Part II)" focusing on further basic principles of IT business value, success and ROI maximisation using BVMF®; see <https://www.iibauk.org/pastevents/1345-virtual-it-value-maximisation-for-business-analysts-a-closer-look-at-the-elephant-part-ii> [link temporarily non op.]