

# David P Jacobs BSc Hons, MBCS, BVMS

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## PROFILE

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- Extensively experienced, thought leading **Senior Business Analyst** with a 27 year 'BA' record enacting high-quality and insightful work practices leading to successful results, project value and user satisfaction
- Business analysis career preceded by 16 years as an analyst/programmer overlapping with a 9-year career in marketing information, analysis and research (using information to help drive a business/organisation)
- Also now work as a project leader, deputy/assistant/stand-in project manager, business value, success and ROI maximisation specialist and project rescue/recovery/turnaround practitioner/troubleshooter
- High achiever, taking a holistic, insightful and multifaceted approach, with a strong reputation for delivering significant strategic, tactical and operational business value, success and return on investment
- Versatile business/IT polyglot/polymath, having worked in many business and IT environments in contract, freelance, 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 3<sup>rd</sup> party suppliers, user acceptance testing (UAT), training, mentoring, coaching, business-IT alignment and mediation, facilitation of workshops, leading meetings and initiating progressive directions and sub-projects
- Highly articulate communicator and effective mediator and socialiser between and around IT, the business, the organisation and other departmental functions
- 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), mentor for the International Institute of Business Analysis (IIBA UK) since 2021 and a European Mentoring and Coaching Council (EMCC) Affiliate. Formerly SC cleared

## ATTRIBUTES

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**Experienced/expert in:** Waterfall, Software Development Life Cycle (SDLC), value, success and ROI maximisation with/out use of 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 and earlier versions, business process reengineering (BPR), business and '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 (SRSs) 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), DOORS, Iress Xplan

**Broad industry experience:** worked in private *and* public sectors including banking, insurance, pensions, universities, education, airports, airlines, air cargo, air defence, telecoms, the Post Office, payroll, charities, manufacturing, entertainment, retail, estates & facilities, construction/access equipment, building management

**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' in all directions

**Successful thinker outside the box:** employs 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 progressive own techniques to enhance conventional IT/project methods

## CAREER

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- 03/2025 - present      Business Analyst/Process Consultant      Integral UK (owned by JLL)**
- Leading business process upgrade, functional formulation and data analysis for a facilities management operation's set of workflow procedures, using SharePoint, Power Automate, IBM Blueworks and MS Office
- 11/2023 - 05/2024      Senior Business Analyst      Quilter Wealth Management**
- Led the analysis and design for the Business Channel Optimisation (BCO) programme on behalf of Change, producing and reconciling optimal business and project/programme processes, functional and data related requirements and other key project artefacts in an Agile/Scrum environment using MS Dynamics 365 CRM, Jira, SharePoint, Business Optix and other related IT systems and utilities
  - Supervised other business analysts, supporting the project and programme managers with oversight and coordination for the Advice Hub Transformation sub-projects including design of new processes and systems for Paraplanning, Client Transition, Direct Client Communication, Digital Signing and Telephony
  - Also worked as business analyst for the Wealth Management Transformation (WMT) programme using MS Dynamics 365 CRM designing new processes, data structures and systems
  - Undertook training in Work Force Management and related HR/training systems
  - Acted as member of the Agile Task Force helping to lead Change through optimal adoption of agile practice
  - 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
- 07/2023 - present      Senior Business Analyst/Value Maximisation Specialist/Director      MaxVal Consultancy Ltd**
- Continue to lead 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, consulting and speaking on the subject for the International Institute of Business Analysis (IIBA) UK and other industry bodies
  - Upgrading skills, knowledge, qualifications and capabilities in business analysis, project management and benefits optimisation methodologies
  - Achievements: made several presentations for the International Institute of Business Analysis (IIBA) UK on IT Business Value Maximisation (the next presentation will be in March 2025), deployed a number of articles online on this crucial subject and coached/mentored several business analysts and other IT professionals into better career positions and skill sets
- 01/2023 - 06/2023      Business Analyst      BAE Systems (formerly British Aerospace)**
- As member of the Enterprise IT Project & Portfolio Management's business analysis and change team, supported the International Portfolio's Air division on an overseas military aircraft deployment 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 liaison between the project teams, accurately managing, processing, updating and tracing several hundred requirements through testing to functional satisfaction
- 03/2021 - 01/2023      Business Analyst/Functional Consultant      The Pensions Regulator (TPR)**
- Led selection, formulation and deployment of COTS based case & document management systems using MS Dynamics 365 CRM and associated business processes for manual and automatic bulk case processing
  - Supported the Auto Enrolment programme with analysis and design of IT systems (for 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 cases, 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 users/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 designed a new user onboarding process for case managers using ServiceNow functions
  - 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. benefitting more than 22 million UK pension holders and savers
  - Submitted suggestions for greater effectiveness and productivity, voluntarily leading projects selected for progression 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 on how to bring about better systems and processes using optimal IT-business project work practices especially focusing on best use of agile and 'wagile'/hybrid methods (sat on agile taskforce), presenting the history of IT business value and promoting the use of communities of practice
- Voluntarily coordinated and galvanised attendance at and participation in Government/Civil Service ICT conferences, participating internally as Enterprise Change Champion and Employer Forum Representative
- 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 - 01/2021 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 a new MS Dynamics CRM based system for the transport hire-out department
- 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 3<sup>rd</sup> 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 SQL Server. Provided management with detailed documentation to enable evaluation & selection of best new system for the disability transport department

**10/2016 - 01/2020 Senior Business Analyst/Value Maximisation Specialist/Director Maximum Value Ltd**

- Undertook continuing professional research and development to gain optimal results from IT and digital transformation, extensively upgrading business analysis and project management skills in this vein
- Obtained accreditation in Agile business analysis from APMG via Knowledge Academy
- Continued to research and develop own proprietorial Business Value Maximisation Framework (BVMF®)
- Achievements: significantly upgraded skills and qualifications in business analysis and project management especially with respect to use of agile and gaining optimal business value, success and ROI

**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 - support Allianz Insurance**

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

**03/2013 - 10/2013 Business Analyst - recruitment & admissions Royal Holloway University of London**

**02/2012 - 02/2013 Business Analyst - business case/feasibility studies The Post Office**

**09/2011 - 11/2011 Business Analyst/Consultant Canterbury Christchurch University via Watt Works Consultancy**

**06/2011 - 09/2011 Business Analyst - target operating models (TOMs) Barclays Retail UK**

**03/2011 - 05/2011 Business Analyst/Consultant - project management systems BAA Heathrow via Atkins**

**11/2010 - 02/2011 Business Analyst - incorporation of HBOS 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 Ltd**

<b>2009 - 2010</b>	<b>Business Analyst</b> - building management systems, with BPMN	<b>Gatwick Airport</b>
<b>2008 - 2009</b>	<b>Business Analyst/Consultant</b> - estates and facilities	<b>Westminster University</b> via Project Doctors
<b>2007 - 2008</b>	<b>Business Analyst</b> - change management	<b>Royal Bank of Scotland (RBS)</b>
<b>2006 - 2007</b>	<b>Business Process Consultant/Lead</b>	<b>BPP Professional Education</b>
<b>1997 - 2006</b>	<b>Business Analyst</b> - 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	
<b>1981 - 1997</b>	<b>4GL/RDBMS Analyst/Programmer</b> and <b>Deputy Project Manager</b> for Worldcom, Sun Microsystems, Eastgate Reinsurance, Walt Disney, Prudential, Uniface, Pet Plan, British Gas, Performing Right Society (PRS), Ellert Retail Op Svcs, Stephens & Carter (construction access equipment)	
<b>1978 - 1985</b>	<b>Marketing Information, Analysis &amp; Research Consultant/Director</b>	<b>Atlasair and Air Cargo Trends Ltd</b>
	Served airlines and air cargo forwarders with the first ever coherent UK market information and computer-assisted forecasts. Gained IATA/FIATA Cargo Agents' Professional Diploma and British Airways Certificate in Air Cargo Costing Procedures	
<b>1990 - 2023</b>	Founded <b>David Paul Jacobs Ltd</b> (1990) that became <b>Profit from Information Ltd</b> (1996) to research, develop, propagate gap bridging and IT business value, success and ROI maximisation skills and structures. This morphed into <b>Maximum Value Ltd</b> (2010), adding <b>Do IT Better Consortium (DIBC)</b> (2014), becoming <b>MaxVal Consultancy Ltd</b> (2022) and adding <b>BVMF Ltd</b> (2025)	

## **HIGHER EDUCATION, LANGUAGES, COURSES AND EVENTS**

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Education:	BSc Hons, Management Science - Warwick University (Business School)
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:	Since 1990, 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**

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### **1993 - 2025**

Headed up an IT Business Value Maximisation Research & Development Programme consequently authoring Business Value Maximisation Framework (BVMF®). See [www.Maximum-Value.co.uk](http://www.Maximum-Value.co.uk) for links to articles, webinar recordings, podcast, videos and editorials, and <https://BVMF.info> for training and certification

Continuing to write, speak, present, mentor, coach, support and train business analysts, project managers, CIOs and other key roles in business IT, both online and in person, in the principles of value, success and ROI maximisation pertaining to IT projects, digital transformation and related activities (like BAU, CI, etc)

Attendees at these training presentations and webinars said "Really good presentation when value is topical. Interesting, and given us food for thought.", "Excellent session - loved the presenter's style, knowledgeable and fun.", "Genuinely valuable.", "BVMF® is extreme common sense; I wish I'd known about it years ago."

One client (the Estates Planning Manager) at Westminster University (Estates and Facilities Dept) said "The work you have carried out suggesting improvements to our processes is particularly noteworthy. Your attention to detail combined with an appreciation of the overall benefits has taken us a long way to success."

## **ADDITIONAL AND EXTRA CURRICULAR SKILLS, KNOWLEDGE AND CAPABILITIES**

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Property maintenance/management; advanced driving; basic first aid; self-defence; security awareness; personal/polymathic power; professional performance; mental health & resilience; development of techniques for effective thinking, decision making, analysis, interviewing and team working; high quality presentational skills; successful entrepreneurship and leadership; modernisation of English grammar and punctuation.

Recent/current reading/study includes politics, economics, corporate ethics & behaviour, personal, professional and societal wellbeing, international conflict/peace, modern history, philosophy, logic, contemporary culture, psychology, IT and digital transformation's success factors and progression of heightened levels of net benefits.