

David P Jacobs BSc Hons, MBCS, BVMS

Weybridge, Surrey, United Kingdom

M: +44(0)7799 036652 L: +44(0)1932 248027 E: DavidJ@Maximum-Value.co.uk

W: www.DavidPJacobs.co.uk LI: www.linkedin.com/in/davidpjacobsbcs

PROFILE

Experienced, versatile **Senior Business Analyst**, business value maximisation specialist and thought leader

Highly **multiskilled, cross-functional business/IT mediator** engendering value, success & ROI, author of **Business Value Maximisation Framework (BVMF®)**, lead trainer at www.BVMF.info

Brings successful outcomes in any business or IT environment using powerful, transferable skillset

Referenceable reputation for high satisfaction from sponsors, business process owners, IT users, CIOs, other C-suite, senior executives, project members, colleagues and all roles involved or affected

Leading/founder member of several industry think-tanks on current developments such as Artificial Intelligence (AI), Business Analysis, IT/Project Value Maximisation and Digital Transformation

- Former **marketing information analyst, researcher** and **analyst/programmer**, also work as **team lead, assistant/stand-in project manager** and **project rescue/recovery practitioner**
- **Insightful, holistic, systematic, detailed approach** couples with big picture vision to deliver significant strategic, tactical, operational value and business/organisational productivity gains
- **Specialities include** scope definition, business case development, feasibility studies, project initiation (PID), stakeholder management, requirements gathering & management, gap analysis, business process analysis/modelling/reengineering (as-is & to-be), target operating model (TOM) definition, data analysis/modelling and migration, software product (COTS) selection, dealing with 3rd parties, user acceptance testing (UAT), training, mentoring, coaching, business-IT alignment, facilitation of workshops, leading meetings, initiating sub-projects such as user surveys, etc.
- **Business analysis mentor/coach** for the British Computer Society (BCS) and International Institute of Business Analysis (IIBA) - European Mentoring & Coaching Council (EMCC) Affiliated
- **Business Value Maximisation Specialist/Consultant**, see www.Maximum-Value.co.uk

ATTRIBUTES

Experienced in: Waterfall, Software Development Life Cycle (SDLC), business value, success and ROI maximisation, Business Value Maximisation Framework (BVMF®), Relational Database Management Systems (RDBMS), Structured Query Language (SQL), MS Office incl. Visio, Business Intelligence/Insight (BI), management information (MI), data marts/warehousing, MS Dynamics 365, CRM, business process reengineering (BPR), business & digital transformation, improving business processes and associated IT systems

Good knowledge of: Agile, Dynamic Systems Development Method (DSDM), PRINCE2, ERP, 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) incl. Banner, QL, SITS and Ellucian, Confluence, Triaster, MS Teams, Access, Project and SharePoint, Business Process Management (BPM), workflow, draw.io, Lucid chart, Miro, HTML, BABOK, Capability Maturity Model Integration (CMMI), Conference Room Pilots (CRP), Systems Thinking, APIs, ETL, OpenText's Documentum case & document management, Azure, DevOps, GDPR/DPA/GDS, Power BI, Jira, Life Cycle Management (LCM), Salesforce, ServiceNow, OOAD, DOORS, Iress Xplan, Figaro (FNZ), IBM Blueworks, RACI, Power Automate, Communities of Practice (COPs)

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

Creative thinker outside the box: 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 and project methods

Client comments: the Estates and Facilities Planning Manager at Westminster University 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."

The European Procurement Manager for a global manufacturer said, "**I wish all IT people spoke your language.** I have yet to meet anyone who can read, interpret and translate IT terminology into better business sense. You have helped us to gain more business value than we thought possible."

The European Banking Manager of an international payroll outsourcer said, "**You have provided a sheer quality service** (modelling our processes); we learnt much about improving our effectiveness and efficiency."

CAREER (contract CT, permanent P, direct consultancy DC)

- 12/2025 - 02/2026 Senior Business Analyst (CT) i3Works for DEFRA/EA**
- Led the business analysis on a project for the Environment Agency to migrate a substantial number of MS Access database systems to a newer more secure platform, being the MS Dataverse, SQL Server, Power Platform, Power BI, etc. Working in an Agile way using JIRA, using a dot gov.uk email address
- 07/2023 - 03/2026 Senior Business Analyst/Value Maximisation Specialist/Director (DC) MaxVal Consultancy Ltd and BVMF Ltd**
- Continue to lead an ongoing research and development programme into the maximisation of IT business value, success and return on investment (ROI), authoring, presenting, training and consulting on the subject for the International Institute of Business Analysis (IIBA) UK and other key industry bodies
 - Upgrading industry-wide skills, knowledge, qualifications and capabilities in business analysis, project management, benefits management and value optimisation wrt new methodologies, disciplines, etc.
 - Presenting courses on Business Value Maximisation Framework to analysts and transformation leaders
 - Achievements: have kicked off the "75% Fail to 75% Succeed!" initiative at several live public sector events on behalf of the business/IT industry and have delivered training in BVMF® that has significantly raised awareness of the need and capability to maximise project success, business value and ROI
- 03/2025 - 06/2025 Business Analyst/Process Consultant (CT) Integral UK (owned by JLL)**
- Led business process reengineering (BPR), functional design and data analysis for a set of facilities management operational workflow processes, leading to systems implementation using SharePoint, Power Automate and various MS Office applications, working closely with the Commercial Manager as primary SME and a specialist developer from third party software company
 - Supported Commercial Manager in documenting as-is processes and formulating to-be processes using IBM Blueworks, Excel and Word
 - Achievements: supported Commercial and Financial Managers to their high satisfaction with advice, critical review and design of new processes, development of associated new system, glossary & documentation
- 11/2023 - 05/2024 Senior Business Analyst (CT) Quilter Wealth Management**
- Led 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 Agile/Scrum environment using MS Dynamics 365 CRM, Jira, SharePoint, Business Optix and other related IT systems and utilities
 - Supervised and coordinated other business analysts, supporting the project and programme managers with oversight and coordination for Advice Hub Transformation sub-projects, including design of new processes and systems for Paraplanning, Client Transition, Direct Client Communication, Digital Signing & Telephony
 - Operated as business analyst for the Wealth Management Transformation (WMT) programme using MS Dynamics 365 CRM designing new to-be processes, data structures and systems and interfacing with Xplan
 - 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
- 01/2023 - 06/2023 Business Analyst (CT) BAE Systems**
- As member of the Enterprise IT Project & Portfolio Management's business analysis and change team, supported the International Portfolio's Air division on IT infrastructure design for an overseas military aircraft deployment with requirements definition, management and enaction, using LCM (Lifecycle Management), Jira, Confluence and other tools working with 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 (P) The Pensions Regulator (TPR)**
- Led selection, formulation and deployment of COTS based case/document management systems using MS Dynamics 365 CRM upgrading business processes for manual and automatic bulk case processing
 - Supported the Auto Enrolment programme with analysis and design of new processes and IT systems including for Business as Usual (BAU) and Continuous Improvement (CI), 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, documentation and management procedures advising management of results
 - Produced business cases, requirements documentation, process and data models, test and implementation plans, coordinating design and development teams, architects, database teams, support and service management, project management, senior business users and other 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 to maximise effectiveness of their roles, career progression and business value for them, their colleagues and beneficiaries of systems and processes deployed, 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 fixes, systems and processes, all subject to GDPR, DPA and GDS
- Made presentations on how to bring about better systems and processes using optimal project work practices, especially focusing on best use of agile and 'wagile'/hybrid methods
- Participated in Agile Taskforce, presented on history of IT, promoted use of communities of practice (COPs)
- 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, supporting team members to help the eventual internal and external user experience to be much higher quality so benefitting 1,000 TPR users and over 22 million savers/pension holders, using a dot gov.uk email address

02/2020 - 01/2021 Business Analyst/Project Lead (CT) Queen Elizabeth's Foundation (QEF)

- Created to-be business process models from as-is, functional requirements and design proposals for a new MS Dynamics CRM based system for the transport hire-out department
- Migrated substantial sized data sets out from MS Access into SQL-Server and a number of related business processes from MS Access to MS Dynamics 365 CRM
- Conducted ETL using MS Access utilities, SQL Server Management Studio and Excel
- Evaluated and used tools 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 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 MS Dynamics 365 CRM
- Achievements: conducted successful data migration from MS Access to SQL Server. Provided management with detailed documentation to enable selection of best new system for the disability transport department

07/2015 - 01/2020 Senior Business Analyst/Value Maximisation Specialist/Director (DC) Maximum Value Ltd

- Undertook continuing research and development for gaining 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 (CT) British Airways

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

05/2015 - 06/2015 Business Analyst (CT) National Australia Bank (NAB)

08/2014 - 03/2015 Business Analyst (P) - support Allianz Insurance

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

03/2013 - 10/2013 Business Analyst (CT) - recruitment & admissions (D365/CRM) Royal Holloway University of London

02/2012 - 02/2013 Business Analyst (CT) - business case/feasibility studies The Post Office

12/2011 - 12/2011 Business Analyst (CT) - urgent interface/process design Sophos Ltd

09/2011 - 11/2011 Business Analyst/Consultant (DC) Canterbury Christchurch University

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

03/2011 - 05/2011 Business Analyst (CT) - project management system BAA Heathrow/Atkins

11/2010 - 02/2011 **Business Analyst (CT)** - incorporation of HBOS **Lloyds TSB**

2010 - 2011 **Business Analyst/Consultant (DC)** **Woking & Sam Beare Hospices**

2010 - 2010 **Business Process Consultant (DC)** **ADP Employer Payroll Services**

2009 - 2010 **Business Analyst (CT)** - building management system, BPMN **Gatwick Airport**

2008 - 2009 **Business Analyst/Consultant (DC)** - estates & facilities **Westminster University**

2007 - 2008 **Business Analyst (CT)** - change management **Royal Bank of Scotland (RBS)**

2006 - 2007 **Business Process Consultant/Team Lead (CT)** **BPP Professional Education**

1997 - 2006 **Business Analyst (CT)** - process, data, requirements, test, implementation for Fujitsu, Cisco, Vodafone, Ordnance Survey, Teletext, Hereford & Worcester Chamber of Commerce, More Group, Barclays, Air Products (ERP, financial reporting)

1981 - 1997 **4GL/RDBMS Analyst/Programmer (P & CT)**
for Worldcom, Sun Microsystems, Eastgate Reinsurance, Walt Disney, Prudential, Uniface, PTT Telecom, Pet Plan Insurance, British Gas, Performing Right Society (PRS), Ellert Retail Operation Services, Stephens & Carter (construction equipment)

1976 - 1985 **Marketing Information Analyst & Research Consultant (P & DC)**
for Atlasair (air cargo), Air Cargo Trends (air cargo market analysis), SDG (transport research), Market Power (market research)
Served airlines and air cargo forwarders with the first ever coherent UK market information and self-written computer-assisted forecasts. Gained IATA/FIATA Cargo Agents' Professional Diploma and British Airways Certificate in Air Cargo Costing

HIGHER EDUCATION, LANGUAGES, COURSES, EVENTS & MEMBERSHIPS

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
BCS Certificates in Business Analysis (2016) and Modelling Business Processes (2016)
Public Speaking Certificate - A Harrington's Public Speakers University (PSU), 2022

Events: Since 1990, have attended and participated in many conferences, events, seminars and webinars on business analysis, business/IT methods, professional performance, project management and industry record on project succeed/fail reasons, lessons and fixes

Memberships: BCS Project Management Group (PROMS-G) since 1990, IIBA since 2015, EMCC since 2023

BUSINESS VALUE, PROJECT SUCCESS & ROI - RESEARCH, DEVELOPMENT & CONSULTANCY (DC)

1995 - 2026

Founded **Profit from Information Ltd** to research, develop and propagate business-IT gap bridging and business value, project success and ROI maximisation skills and structures. This morphed to **Maximum Value Ltd** in 2010, adding **Do IT Better Consortium (DIBC)** in 2014. **Maximum Value Ltd** became **MaxVal Consultancy Ltd** in 2022 adding **BVMF Ltd** in 2025 to offer training courses and certification to business analysts, project managers and CIOs and their teams in IT project success, business value and ROI maximisation.

Headed up a 30 year IT Business Value Maximisation Research & Development Programme consequently authoring Business Value Maximisation Framework (BVMF®). See www.Maximum-Value.co.uk for articles, webinar recordings, podcast, videos and editorials; see <https://BVMF.info> for training and certification

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

Attendees at these presentations, courses 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".

More client comments are at <https://www.maximum-value.co.uk/testimonials.html> & <https://bvmf.info/testimonials/>

MaxVal Consultancy's YouTube channel looking at project success, business value and ROI maximisation is at <https://www.youtube.com/@ITBusinessValueMaximisation>

EXTRA CURRICULAR SKILLS, KNOWLEDGE AND CAPABILITIES

Property maintenance/management; advanced driving; basic first aid; self-defence; security awareness; personal/polymathic power; professional performance; mental health resilience; 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, golf, yoga, squash, keep fit. Recent/current reading/study/research includes politics, economics, corporate ethics; personal, professional and societal wellbeing; international conflict/peace, modern history, philosophy, logic, contemporary culture, psychology.

Security and Other Qualifications

Formerly SC cleared (currently expired), current holder of enhanced DBS certificate and BPSS. Part-time Computer Science/ICT GCSE tutor, qualifications listed at www.davidjacobs.co.uk

APPENDIX - Unusually Capable and Effective Business IT Professional

Extensively experienced senior business analyst with highly versatile all-round business/IT capability.

Strong reputation for engendering success, value and Return On Investment (ROI), cohering project team members around the common goal of a maximum value result for all.

Gains high degrees of satisfaction and success, given how many projects and related work often struggle to meet the ever-rising challenges and expectations.

Spent several decades in business and organisational IT in many sectors and environments, specialising in front and back-office processes. Mediates well between almost any parties or teams using my multidisciplinary, polymathic skillset garnered from extensive, eclectic experience in business information, strategy and IT.

Has strong understanding of almost every aspect of the rapidly changing workplace, especially around how to engender higher rates of success, value and ROI.

Have rescued challenged projects mediating business and IT to work to common goals.

Has an ingrained, inherent skill to engender the beneficial use of IT to gain optimal productivity from business processes according to business/organisational objectives and the constraints all involved are working under.

Has been a Business Analyst for 28 years after 16 years as an analyst/programmer and a decade as a marketing information analyst and research consultant, most valuable skill is 'putting it all together' using multifaceted skills, speaking all the relevant languages to manifest business/IT effectiveness, success, value, ROI, business outcome, productivity and boosts to morale.

Has excellent knowledge of successful leadership, coaching and mentoring and have recently been a successful coach/mentor for the International Institute of Business Analysis UK and the BCS on business analysis, project management and successful collaborative working.

Author of Business Value Maximisation Framework (BVMF®) and related published articles on business IT success and value maximisation.

Conference/event/video speaker/presenter on business analysis, entrepreneurship, leadership, project success, business value and ROI maximisation.

Key Published Articles and Testimonials:

Open Access Government (OAG) stakeholder page leads to recent series of articles on successful business IT, value and ROI maximisation	Stakeholder page
Brainz Online Magazine profile leads to David's 'Riding the Storm' series of three articles on professional resilience, business analysis, value maximisation, successful leadership, <u>and</u> enjoying life and career! There is also an interview with David	https://www.brainzmagazine.com/executive-contributor/david-paul-jacobs
List of client comments and testimonials on the MaxVal Consultancy website	https://www.maximum-value.co.uk/testimonials.html
Article published in autumn 2024 on MaxVal Consultancy's mission of 'Maximising IT Success' in the Commonwealth 75th Anniversary's commemorative large format book	https://bit.ly/MaxValConsulting