

# David P Jacobs BSc Hons, MBCS, BVMS

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## PROFILE

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- Versatile, thought leading, strategic value focused **Senior Business Analyst** with 25 plus years in business analysis and more than 40 years in IT and business & digital transformation
- Former marketing information analyst, researcher and computer/software 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**
- 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 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 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), 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 & 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

**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/supply chain, 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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### **11/2023 - 05/2024 Senior Business Analyst Quilter Wealth Management**

- Worked as business analyst on the Wealth Management Transformation (WMT) CRM programme using MS Dynamics 365, and led the business analysis for the Business Channel Optimisation (BCO) programme as part of Change, producing and reconciling business and project/programme processes, functional and data related requirements and producing other project artefacts in an Agile/Scrum environment using MS Dynamics 365 CRM, Jira, SharePoint, Business Optix and other IT systems and utilities
- Supervised other Business Analysts, supporting the project/programme managers with oversight, coordination and business analysis for the Advice Hub Transformation sub-programme and its projects
- Acted 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.

### **07/2023 - present Senior Business Analyst/Value Maximisation Specialist/Dir. MaxVal Consultancy Ltd**

- 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, consulting and speaking on the subject for the International Institute of Business Analysis (IIBA) UK and other bodies
- Upgrading skills, knowledge, qualifications and capabilities in business analysis and project management
- Achievements: made several presentations for the International Institute of Business Analysis (IIBA) UK on Business Value Maximisation (next presentation will be in autumn 2024, tbc) 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 to bring about better systems and processes such as optimal IT-business work practice, best use of waterfall, agile, 'wagile'/hybrid and methods, presenting the history of IT business value and promoting the use of communities of practice (CoPs) for engendering best 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/Dir. 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**
- 2009 - 2010 Business Analyst - building management systems Gatwick Airport**
- 2008 - 2009 Business Analyst/Consultant - estates and facilities Westminster University via Project Doctors**
- 2007 - 2008 Business Analyst - change management 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/RDBMS Analyst/Programmer and Deputy Project Manager**  
for Worldcom, Sun Microsystems, Eastgate Reinsurance, Walt Disney, Prudential, Uniface, Pet Plan, British Gas, Performing Right Society (PRS), Ellert Retail Op Svcs
- 1978 - 1985**                    **Marketing Information, Analysis & Research Consultant/Dir.**  
**Atlasair and Air Cargo Trends Ltd**  
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
- 1990 - 2023**                    Founded **Air Cargo Trends Ltd** (1980) and **David Paul Jacobs Ltd** (1990) that became **Profit from Information Ltd** (1996) to research, develop, propagate 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**

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- 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:                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 - 2024**

Have 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)

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

Attendees at these training sessions 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."

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

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Property maintenance & management, advanced driving, first aid, self-defence, security awareness, personal and professional performance, mental health resilience, techniques for more effective thinking, decision making and analysis, interviewing/team working, presentational skills