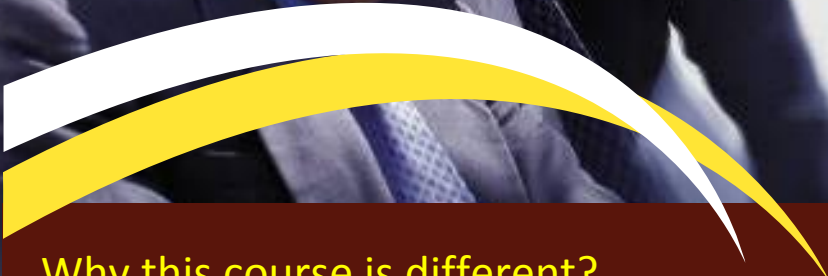


# Business Analysis with Financial concepts

Summer 2010



## Why this course is different?

Traditional courses in business analysis and design usually cover only the theoretical aspects and processes within business analysis, without their application areas or provide associated field level training. In today's competitive market, just having technical knowledge is not enough - the industry demands you to have considerable understanding of its application domain. For example, technical requirements in the financial industry usually requires you to have knowledge about associated fields - products related to equity, derivatives, fixed income, mutual funds or offerings like prime brokerage, stock loaning or locates.

This course aims to provide you not only with the theoretical concepts but also empower you with the financial concepts and practices which are most popular and sought after in today's financial industry.

## WHAT MAKES A GREAT BUSINESS ANALYST?

- Great communications skills.
- Good understanding of business
- Maintaining strong interpersonal relations
- Excellent analytical skills
- Strong documentation skills

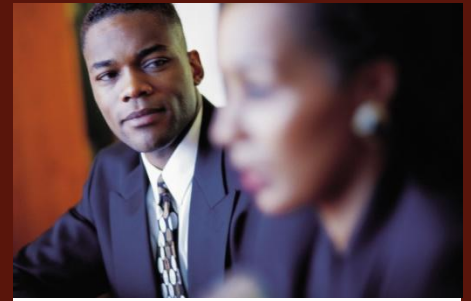
### Location of the classes

CLD & Associates consulting inc,  
190 Lincoln Highway,  
Edison, NJ 08820

# What's in it for you?

We list the top 5 reasons what this course would do for you.

1. This course will provide you with concepts on business analysis that is focused towards getting you a job or providing you with an opportunity to move to a better position in the industry.
2. Whether you are a person looking to get a suitable opening or switch to a more high paying financial industry opportunity - this course is for you. The training is structured so that you not only know the buzz words and concepts required but also know the financial products onto which the technology is applied.
3. We have a evaluation based training approach and evaluate you at regular and strategic intervals. This not only lets you know where you stand but also provides an opportunity to revisit modules where you feel you lack confidence.
4. We provide help in preparing or polishing up your resume and hold a series of mock interviews so that it can prepare you for the next step.
5. We at CLD have extensive marketing potential and vast experience in fitting the right profile to the right requirements for full time or consultant roles in the financial industry. This course also gives you the chance to get noticed in the class, so that it can interest us in you to offer a position or a great job in the industry.



## CORE TRAINING OBJECTIVES

- To teach attendees the fundamentals of business analysis and how to use the concepts in a practical day to day environment.
- To teach attendees the core concepts of business understanding and analysis including requirements analysis techniques, UML diagrams like use case diagrams, using tools like Visio, etc
- To provide a detailed analysis of different SDLC processes like agile development process, waterfall model, etc
- To impart the concepts and working of different financial products like equities, derivatives, Credit derivatives, Collateralized debt obligations, foreign exchange trading and mutual funds
- To provide an understanding of different financial products and functions like prime brokerage, trading, etc.

## Course Contents

### Introduction to business analysis

- Role of a Business Analyst
- Ingredients of a Business Analyst
- Why a Business Analyst?
- Structure of Development Team
- Position of a Business Analyst in the development team

### System Development Life Cycle (SDLC)

- Understanding concept of Business Modeling
- Requirement Gathering
- Analysis
- Design
- Implementation
- Testing
- Deployment



### Requirement Gathering Strategy

- Importance of Requirement gathering
- Requirement Gathering Techniques
- Different Types of Requirements.
- JAD Session
- Role of a BA in JAD Session
- Preparing JAD Session Agenda
- How to conduct JAD session?
- Creating Functional Requirement Document
- Creating Software Requirement Specifications

### EVALUATION 1

#### Software Engineering Methods

- Waterfall Method
- Rational Unified Process (RUP)
- AGILE Methodology [RAD]
- Synchronize & Stabilize Methodology
- Prototype Model
- Comparison between Waterfall & Agile

#### Use Case

- Understanding Use Cases
- Use Case Relationships
- Use Case Brainstorming
- Creating Use cases from Requirements
- Creating Use Case Narratives
- Change Management & Version Control Concept

#### Other UML Methodologies

- sequence diagrams
- class diagrams

### EVALUATION 2

### BENEFITS OF INCLUDING A BUSINESS ANALYST IN SOFTWARE PROJECTS

The role of the BA is THE key in software development projects.

Typically, in organizations where no formal structure or processes exist, the Business Owners and Developers communicate directly. This can present a problem: the goal of the Business Owner is to get what they want very quickly, and the goal of the Developer is to give the Business Owner what they want as quickly as he/she can give it to him/her. This leads to creating changes in a vacuum, not necessarily taking the needs of all users of the system into account. There is rarely any detailed definition of the requirements, and many times, the real reason for the request may not make good business sense. There tends to be no emphasis on long term, strategic goals that the business wants to achieve via Information Technology. The Business Analyst can bring structure and formalization of requirements into this process, which may lead to increased foresight among Business Owners.

In recent years, there has been an upsurge of using analysts of all sorts: business analysts, business process analysts, risk analysts, system analysts.

Ultimately, an effective project manager will include Business Analysts who break down communication barriers between stakeholders and developers



### Introduction to financial applications

- Computers and finance
- How are business analysts used in finance industry

### Financial products - Equity

- Trading concepts - OTC and exchange traded
- settlement rules
- what is Market making
- algorithmic trading

### Financial concepts - Derivatives

- Credit derivatives
- Contracts and settlements of derivative products
- Interest rate products
- Collateralized debt obligations – Tranches

### Financial concepts - Fixed income and Foreign exchange

- Concepts of fixed income products
- Bonds - structured and unstructured
- Municipal bonds
- FX trading and structure

### Financial products and common client offerings

- Prime brokerage
- Stock loans
- E-locates
- Custody
- Portfolio management and advisory investment functions
- Deal making and underwriting IPOs

### EVALUATION 3

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## TOWARDS AGILE ANALYSTS

Now is the time to take the next step, to become more agile and become the communication and business experts in cutting edge project teams.

Do you have it in you?

### Review session

- Reviewing the entire Business Analyst course
- Question and Answer session
- Reviewing potential interview questions

### Resume preparations

### Mock interviews

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**[www.cldassociates.com](http://www.cldassociates.com)**