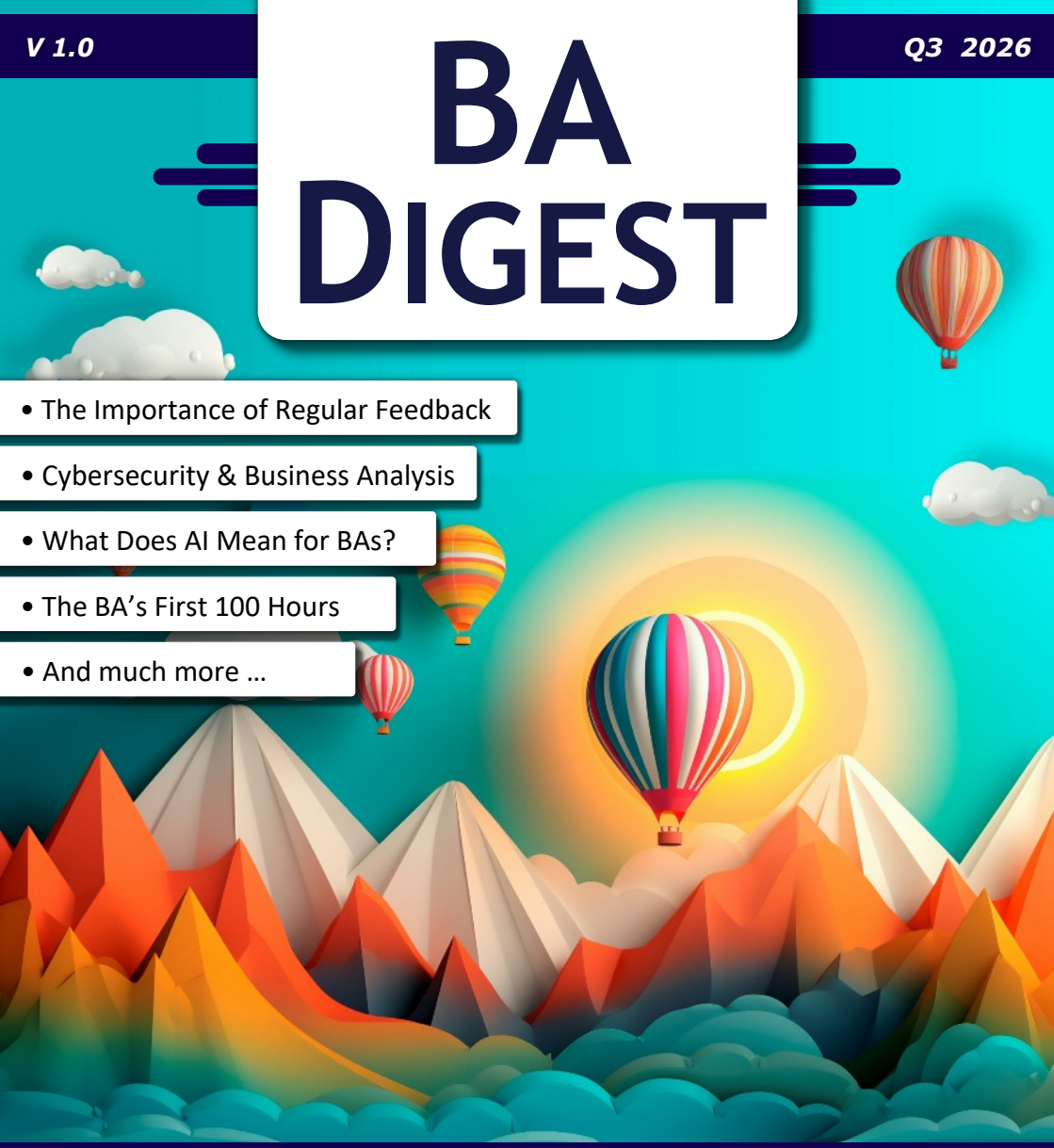
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Q3 2026

BA DIGEST



- The Importance of Regular Feedback
- Cybersecurity & Business Analysis
- What Does AI Mean for BAs?
- The BA's First 100 Hours
- And much more …

Your regular round-up of useful BA content

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Welcome

Welcome to the Q3 edition of BA Digest. As usual, this edition contains a broad mix of articles from a diverse range of authors. I hope that you find one (or many) that resonate with you.

I suspect that more and more of our conversations are focusing on AI: both how AI should be used by BAs, but also (more importantly) how BAs can help ensure AI is used effectively in organisations. While it certainly seems true that AI is here to stay, and we should definitely continue to learn and adapt, in my view it's important that we don't solely focus on this as a community.

Business analysis has always been a broad role. That's one of the many reasons I love it. And it is not only broad, it is also inherently human. Our human-ness (is that a word?!), our empathy and our ability to tactfully and respectfully challenge entrenched views and methods are some of our superpowers. Sometimes we might be the ones putting on the brakes, asking about ethics, and asking whether we should be making a change in the first place.

All of this is to say that while AI is important, and it ultimately will impact the way that many roles and processes work, we should continue to acknowledge the breadth and depth of our role. Good business analysis starts long before a commitment to deliver a specific solution is made, and that up-front strategic analysis is more valuable now than ever.

In a world of rapid deployment, asking questions such as "why?", "what hypothesis are we testing?", "what are our success criteria?", and "what benefits are we seeking here?" become even more important. And this is core BA work.

I hope the breadth of articles in this edition supports that breadth of practice. If you find an article that resonates with you, be sure to connect with the author. Believe me, they will appreciate it.

Thanks as always to the authors who have so generously shared their time and expertise. Thanks also to the advertisers. Remember, they help to keep BA Digest free, so be sure to check out their services and keep them in mind.

Adrian

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From the Sidelines to the Centre: How Business Analysts Turn Absentee Management into Leadership Opportunity

Pratima Bhatnagar

Imagine the scene: You've been embedded in a project for months. You know the workflows, the trade-offs, the risks, and the reasons behind every design decision. The team has progressed sprint by sprint, blockers have been resolved, and user acceptance testing is nearly complete. Then, just weeks before go-live, the engagement manager reappears.

The questions come fast. Why was this approach chosen? Who approved that decision? Why wasn't this dependency surfaced earlier? The tone shifts. What should have been a routine sprint review becomes a forensic review of months of work—by someone who was not there to see it unfold.

For many business analysts, this moment feels both unfair and

familiar. And in my experience of consulting and enterprise delivery environments, it is not an uncommon scenario.

The Reality of the Absentee Manager

Absentee managers are rarely negligent. More often, they are stretched thin across competing initiatives, client escalations, travel schedules, and leadership expectations. The modern delivery environment rewards fragmented attention, and project teams often receive only what focus remains after all other commitments have been met.

The result is a leadership vacuum. Decisions are made without visible sponsorship. Stakeholder alignment weakens. Context becomes tacit knowledge in the heads of a few people instead of contributing to shared understanding. When leadership re-engages, they do so with significant context debt—months of nuance compressed into a single meeting. Friction is inevitable.

Most teams interpret this as a management failure. Experienced BAs recognise it as something else entirely: an opportunity for professional leverage.

Why Business Analysts Are Positioned to Stabilise the Project

Business analysts sit at the crossroads of delivery. They translate business intent into functional design, technical constraints into business implications, and execution realities into decision-ready insight. They track dependencies, document outcomes, and maintain continuity as team members rotate and priorities shift.

When leadership presence is inconsistent, this connective role becomes critical. Not to replace management—but to create the structure that leadership relies on once it returns.

The BA's contribution in this moment is not authority. It is clarity.

Tools That Turn Chaos into Continuity

Strong BAs build systems that make projects resilient—even when people are not.

A living decision register is foundational. Every major design or process decision should be documented with its rationale, trade-offs, and approver. This is not defensive documentation, it's institutional memory. When leadership enters, these records transform months of work into a coherent narrative rather than a battlefield of assumptions.

Equally important is a visible RAID log. Risks, assumptions, issues, and dependencies must be reviewed—not buried. A well-maintained RAID log prevents small uncertainties from becoming major escalation points and gives returning leaders immediate visibility into where attention is truly required.

Communication, however, is where most BAs underperform in my experience. Executive updates are

often accurate yet unusable. Leaders need to know three things: Are we on track? What decisions require my input? What risks demand my attention? Status without interpretive context is noise. Analysts who learn to frame updates around *impact* rather than *activity* become indispensable.

Finally, effective BAs communicate in three directions. Upward to leadership with synthesised insight. Sideways with solution architects and peers while managing dependencies. Downward to delivery teams so they understand why priorities change. Same facts, different framing—intentional communication.

When the Situation Has Already Derailed

If the manager has returned late and tension is already present, defensiveness only compounds the problem. The more effective move is diagnosis.

Ask what information was missing, not who failed. Identify decisions that lacked documentation, updates that were too tactical, or risks that were insufficiently elevated. Then reset expectations explicitly.

Schedule a communication alignment conversation—not a status call. Ask which meetings leaders want to attend, how they prefer updates, what decisions require advance visibility, and what level of detail is useful. This positions the BA not as reactive support, but as a delivery professional invested in alignment.

Where appropriate, establishing a periodic skip-level touchpoint (i.e. a meeting with a manager's manager) is not politics—it is delivery hygiene.

The Leadership Path Hidden in Plain Sight

Absentee managers are frustrating. They are also one of the most effective leadership training environments available to business analysts.

In these conditions, analysts develop judgment under ambiguity. They learn how to keep teams moving without constant approval, how to surface risk without inflaming tension, and how to re-engage stakeholders without triggering defensiveness. They learn, crucially, how to tell the story of a project so well that even a late arrival can quickly find their footing.

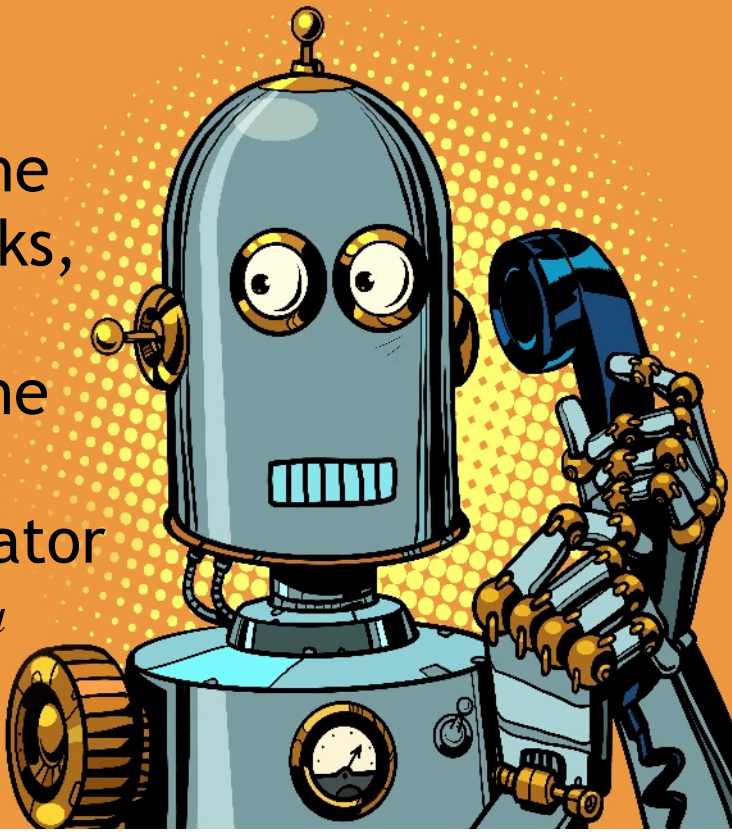
The BAs who evolve into engagement leads, delivery managers, and practice leaders are rarely the most vocal in the room. They are the ones who build structure when it is missing, clarity when it is needed, and calm when the project feels unstable.

Absentee managers will continue to appear throughout your career. The question is not whether they will—but whether you are prepared to turn their absence into your opportunity.

Pratima is a Managing Consultant at Guidehouse with more than ten years in the ServiceNow space. She works at the intersection of business process consulting and enterprise platform delivery, and writes about the craft of business analysis for practitioners in the field.

When AI Handles the Frameworks, Soft Skills Become the Real Differentiator

Jiří Studnička



The business analysis profession is undergoing a fundamental shift. While documentation has always been a necessary part of our work, true value has never come from volume or quantity. Instead, it has come from our ability to understand, interpret and influence the business context.

Now, generative AI is transforming the more mechanical and repetitive aspects of our tasks into commodities. This transformation unlocks a powerful opportunity: to shift our focus away from the "how" of creating documentation and towards the deeper "why" of delivering real business value.

The Next Tool in the Kit: Beyond the Blank Page

For decades, BAs spent hours wrestling with the "blank page", mapping process flows, categorising stakeholders, structuring SWOT analyses. These frameworks form the skeleton of analysis, but not its soul.

AI has solved the "blank page syndrome". It can help a BA generate the first draft of a process model or the start of a non-functional requirements list in seconds. This shift frees us from routine framework application, allowing us to focus on deeper analysis, strategic alignment,

and human insights no algorithm can grasp.

We evolve from "builders of documents" to "architects of value."

Accelerating the Start: The BA as an Interpreter

If AI can produce documentation, what is the BA's role? The difference lies between information and knowledge.

AI excels at synthesising information but lacks context, your organisation's culture, history, and constraints.

AI accelerates the start and provides a baseline. The BA becomes a high-level editor and interpreter. Instead of spending days writing requirements, you spend hours refining AI-generated drafts, aligning with strategic pivots, navigating legacy system nuances, and validating solutions to solve root problems.

Your value shifts from writing to judgment.

The New Competitive Edge: Sense-making and Reading the Room

As technical artefacts become a commodity, the true differentiator for a business analyst shifts into the grey areas where algorithms lose their footing. This competitive edge is found in the sophisticated synthesis of sense-making and interpersonal intelligence.

Sense-making is the uniquely human ability to connect dots that AI simply cannot see. While AI models are brilliant at identifying patterns within existing data, they cannot grasp the hidden motives behind organisational chaos or a sudden, unrecorded shift in corporate priorities.

A human analyst excels at interpreting ambiguous and conflicting information to find a strategic path forward. We provide the critical inquiry necessary to challenge both the AI's suggestions and a stakeholder's initial "wants", ensuring that the final solution addresses a root cause rather than just a symptom.

Beyond pure logic, the most critical variables of a project often exist in the unspoken dynamics of a meeting room. AI lacks the situational awareness to truly "read the room" or detect subtle hesitation in a sponsor's voice that signals a lack of genuine buy-in.

It takes a human to navigate unwritten cultural rules and bridge the gap between technical possibility and human adoption. In this environment, radical empathy and diplomacy are no longer just soft skills; they are high-value professional assets that determine whether a project is embraced or ignored.

Human-in-the-loop: Orchestrating the AI Agents

In my view, the future BA workflow will evolve to what could be described as being the "human in the loop".

AI agents handle speed, pattern recognition, and draft generation, but humans review, contextualise, adjust, and approve.

The BA's responsibility in an AI-augmented workflow involves:

- **Contextualisation:** Feeding the AI the right nuances so the output isn't just generic, but specific to the business goal.
- **Ethical Oversight:** Reviewing outputs for bias or "hallucinations" that could lead to costly development errors.
- **The Approval Gate:** Identifying critical decision points where human empathy and strategic insight are non-negotiable.

For example, AI may suggest automated solutions for customer churn, but you evaluate alignment with brand values and decide whether to override for a more nuanced approach.

Effective collaboration between human judgment and AI efficiency leads to superior outcomes.

Adapting and Thriving: The Strategic Evolution

For senior BAs, the path forward is clear: move "upstream". If AI handles the tactical execution of artefacts, you must become a strategic advisor.

Invest in mastering soft skills such as empathy, negotiation, facilitation and sharpen cognitive abilities like critical thinking and adaptability. These become scarcer and more valuable.

Lead with ethics. Guide conversations on data privacy, fairness, and human impact.

Embrace AI as augmentation, not competition. Learn to prompt effectively, understand AI's limits, and delegate busywork to focus on high-impact activities.

Human plus AI, Not Human versus AI

The future of business analysis isn't a zero-sum game between humans and machines. It is a partnership.

AI provides the speed, the pattern recognition, and the structural skeleton. The human BA provides the heart, the context, the ethics, and the direction.

The frameworks we use are still relevant, but they are no longer the destination. They are the starting line. By embracing AI as a powerful assistant, we can step out from behind our monitors and into the room where the real decisions are made.

In the AI era, being a "good analyst" means more than accuracy; it means being human. Sharp analysis is commoditised; wisdom, empathy, and the ability to navigate human complexity remain irreplaceable.

Jiří Studnička is an IT Business Analyst and Product Owner writing about the less visible side of business analysis. The thinking, conversations, and decisions that shape software projects long before anything is built. Connect on LinkedIn:
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Feedback, the Gift That Keeps Giving

Heather Mylan-Mains

Learning what useful, actionable feedback is and isn't has literally changed how I hear and speak to people. I feel better equipped to evaluate what I hear and to share clear feedback when needed. Now I give myself permission to hear feedback and dismiss comments that once hurt me. I evaluate the comments that help me and decide how to make changes to improve myself.

I learned that most comments I had shared and received were not feedback in the truest sense of the word; instead they were opinions, advice, or complaints. This was critical learning for me to understand what feedback isn't. For example, the phrases "Nice job on that!" or "I didn't like that" are simply indications of what someone liked or didn't like. I think this is the most common kind of "feedback" provided. These are statements of opinion, not feedback.

The statement, "I don't understand why you did that", is given as feedback, but it is actually a complaint. This phrase gets closer to feedback: "You could improve understanding by rewriting that to make it clearer." This is advice on something you could change, more helpful than "I didn't like that!", but it still isn't useful and actionable feedback. It doesn't specify *what* is unclear or specifically *how* the recipient would measure improvement.

Know the Goal

Feedback is useful when it provides information about the effects of an

action in light of a goal. Knowing the *goal* that is being pursued is crucial. If asked for feedback on a presentation that is intended to persuade me to think differently, my comments should help the presenter understand what they did to persuade me, or what they didn't do but could have to persuade me. Feedback would describe what the presenter shared that made me believe the information was accurate, credible, and believable. If I didn't believe it, I could mention what I didn't find credible in the presentation and why I didn't believe it.

For example, if the presenter shared particular facts or images that compelled me to trust the message, mentioning which fact or image and how it made me trust the message is useful feedback. The presenter would know they need to keep doing that for future presentations. If the presenter had information that I didn't trust because the visual was confusing and caused me to question if the information was wrong, saying what confused me and made me doubt the information is feedback.

If there are things that I liked or didn't like, I provide specifics for what I liked/didn't like and why I felt that way. That is feedback! Feedback is fact-based, not based purely on unsubstantiated opinion. It helps us make changes to improve, and highlights what we should continue doing (or even amplify) in our work.

Constructive Feedback

You have probably heard the term *constructive feedback*, and it is worth unpacking this term.

When something is constructed, it is being built. Feedback should build us up, help us build a solid foundation. It should identify cracks in our foundation that we can repair before they become bigger problems.

Early in my career, when I was learning to be a business analysis professional, I had mentors tell me what I needed to improve. When I had requirements that were not complete or a process I missed in my analysis, peer-reviewers pointed out these gaps. I needed to improve my work. Their feedback included why it was important not to leave gaps in my analysis and identified the specific areas to focus on.

It wasn't easy to hear the areas I needed to improve. In fact, before I learned to accept feedback as a gift, improvement conversations felt like a wounding dagger to my heart. I wanted to be perfect in my performance, and I equated feedback to imperfection. I was holding myself to an impossible standard, and this highlighted my relative immaturity in working with others. I had to learn to accept critical feedback as a gift. It is a necessary part of our growth.

Building on an Example

Let's reflect on the phrase I mentioned earlier, "You could improve understanding by rewriting that to make it clearer". Although it is well-intentioned, it hasn't quite reached the threshold for being usable feedback.

Adding some specific facts makes it actionable feedback. For example: "In the first paragraph, you used an

acronym I didn't understand, and I had trouble following the rest of your proposal because I didn't know what you meant." With those details added, I know exactly what wasn't clear and how I can fix it to make it clear to my audience! This is a gift!

Keep the Conversation Going to Get Feedback

Knowing that much of what I had shared or received was opinions, advice, or complaints changed how I heard and received information.

Now, when I hear "I liked that", instead of simply saying "Thank you", I respond with: "Oh, that's good to hear. Will you tell me what you liked?"

I may hear "I liked the beginning of your presentation." I respond, "That's great! What in the beginning did you like?"

I hear, "I liked that story you told."I respond, "The story about my trip to the Grand Canyon? What about the story did you like?" (Are you sensing the 'five whys' technique in this?)

I keep the conversation going until I get feedback. This dialogue helps the person understand what feedback is, as opposed to just an opinion. This is helpful for both of us. When giving feedback, I no longer respond with "I liked that". I indicate what I liked and why I liked it.

Sharing feedback is a reflection of care for another person because I want to see them succeed. I share things to build them up, *because* I want them to succeed. Sharing feedback can take courage to help someone see where they can improve. It is hard to hear things about ourselves that need improvement, but listening and taking action to improve is critical to our success and growth.

It's important to remind myself that although someone shares something that I could improve, it is my responsibility to evaluate the feedback. It may be something that I change, or it may be something I don't take action on. It is up to me to make changes.

It's still hard to hear when I need to improve. I am working on accepting feedback as a gift, but now I know it is a gift. Remember to thank the person for the feedback. It takes courage to share ideas on improvement and the courage to accept them. It takes courage to change.

I am grateful to the people who have cared enough about me and my success to share how I can improve in my career or life. I can still get teary when I hear things I need to improve, but I can quickly dry my eyes and evaluate where I can improve and change. That has made all the difference in how I interact with others!

Heather is a Des Moines, Iowa native who loves to travel and always comes home to her humans and hounds. A 20+ year BA advocate, she consults, speaks, and trains with passion. Her book, Unwrapping Forgiveness, arrives Summer 2026. She holds an MBA, CBAP®, and several PhDs (pretty hard days).



Blueshift: How Business Analysis Can Help Ensure That Transformation Is Delivered Securely

Mark Cross

There are many sides to cybersecurity business analysis. In my previous article, I introduced the red shift: applying adversarial thinking during the early stages of change delivery to identify risks and expose hidden assumptions. On its own, however, this does not change anything unless we act on what we have learned. That is the blue shift of cybersecurity thinking.

Two Sides of the Same Coin

Cybersecurity shows up in BA work in two distinct ways. The first is cybersecurity *within* business analysis: the security signals that present themselves during our ordinary work. While we are running a discovery workshop, reviewing a process, or mapping a supplier integration, we'll typically find issues that are within our abilities to resolve. Recognising those moments is a core skill for any BA.

The second is business analysis *for* cybersecurity: working as a BA on projects that exist to deliver security capability. Examples might include a new identity platform, new monitoring capabilities, or a remediation programme in response to new cybersecurity legislation. Here security is the domain within which we operate. Both sides are strongest when BAs understand the security dimension of their work.

Cybersecurity within Business Analysis

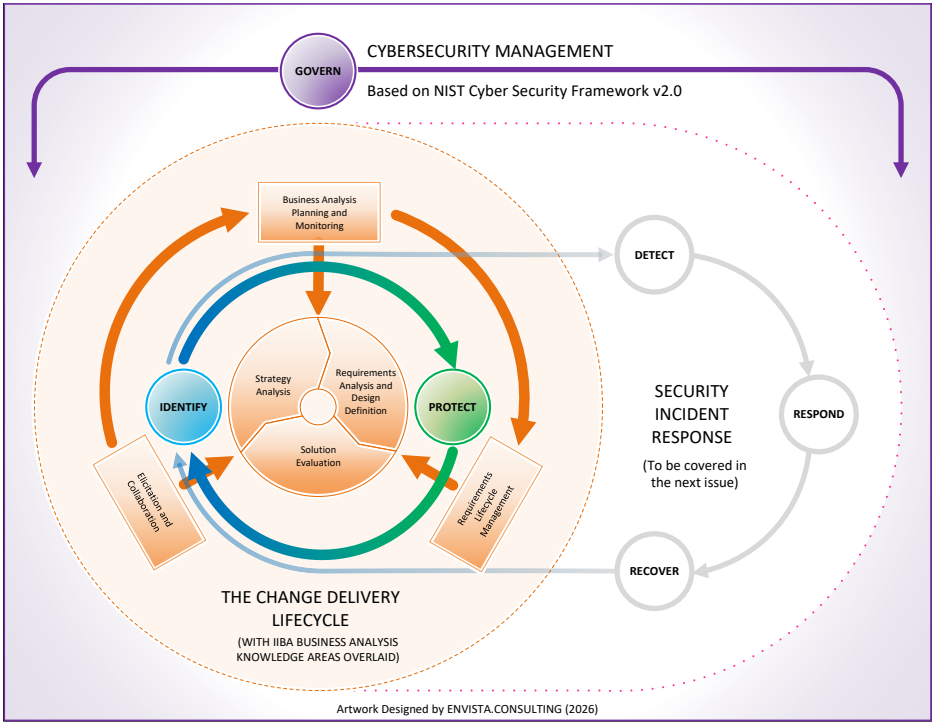
Some years ago I was working with a luxury fashion brand on a cloud adoption project. While analysing some security reports, I noticed that the designers had been using an unauthorised cloud service to exchange design files and fabric patterns with the factories that would produce them. It was free, it worked, but a quick scan of the terms of service revealed that they granted the service provider a persistent right to analyse and reuse any data that crossed its platform. They could retain those patterns indefinitely, train AI models on it, and in theory reproduce the designs before the brand's own public reveal. For a fashion house whose commercial model rests on creating anticipation for each new season, this was an existential threat to the marketing campaign for an entire collection.

I reported my concern and the organisation phased out the unauthorised service by mandating approved alternatives. For me, this was just a couple of days' work but the value to the business in protecting their Intellectual Property (IP) couldn't be overstated.

This didn't require deep technical skills. It simply required a BA paying attention during normal work, applying a critical mindset, and articulating the problem and what needed to be done about it.

Business Analysis within Cybersecurity

While that story shows how business analysts can perform valuable security work on an informal basis, the relationship can be far more direct. Many BAs find themselves working on dedicated security projects, and in those contexts we need a shared vocabulary to communicate with security colleagues, sponsors, and auditors. One of the most widely adopted frameworks is the NIST Cybersecurity Framework (CSF), currently in version 2.0. The CSF describes six functions covering the full scope of cybersecurity practice: Govern, Identify, Protect, Detect, Respond, and Recover.



These functions all run alongside each other in a continuous rhythm, with Govern guiding it all. The diagram above illustrates the natural alignment between the BA delivery lifecycle and the Identify-Protect loop within the CSF. The BA cycle of uncovering needs, vulnerabilities, and constraints and then resolving them through requirements and design is the same cycle that Identify and Protect describe in cybersecurity terms.

Govern sits above this loop, framing the constraints that shape it: the basis on which controls are defined, the strategic balance between security and business operations, supplier and third-party risk, the legislative basis for data privacy, and the economics of security investment. Detect, Respond, and Recover sit outside the BA's natural cycle, which is why proactive preparation for them matters. I will return to those in the next article.

The Art of Combining Business Analysis and Cybersecurity

A British financial services organisation asked me to fix what they understood as a VPN performance problem. Post-pandemic traffic patterns had created network congestion on the corporate internet gateways because every packet of a remote user's traffic between the end user's equipment and the cloud was forced to cross the corporate network's internet gateway four separate times whilst they were working from home. The requirement that the project sponsor asked for was increased capacity on the

internet gateways to resolve the performance issue, but the actual business need was for fast, secure access to the services remote workers relied on.

Under *Govern*, I worked with sponsors to re-establish what the organisation was trying to achieve and the constraints that mattered. CSF 2.0 includes a subcategory, *GV.RM-07*, that characterises strategic opportunities as positive risks worth raising in cybersecurity discussions. The framework recognises that good, proactive investigation of security issues can deliver new benefits such as improved end user experience, not only mitigate risk.

Under *Identify*, I inventoried the existing stack with architecture and operations. The VPN was only part of the picture: a secure web gateway, an identity solution, and a data loss prevention tool were each licensed and maintained separately. I mapped each tool to the risks it was mitigating in the risk register.

Under *Protect*, it became clear that when the security risks and technical requirements were viewed holistically, the legacy tooling was a profoundly inefficient solution where technical debt had accumulated over time. The appropriate, modern solution was to migrate to a cloud-based Zero Trust Network Access (ZTNA) architecture that addresses the same risks as the legacy stack but connects users directly to resources without touching the corporate network. Every access decision is authenticated and every session is scoped to least privilege, rather than trusted by network location.

The business case wrote itself. Total cost of ownership for ZTNA was lower than the combined cost of the tools it replaced, user experience and security posture both improved, and the reframe delivered everything the stakeholders had wanted.

What This Means for Your Practice

Both of these stories share a pattern where the BA skill that mattered most was the willingness to ask whether the stated problem was the actual problem. The cybersecurity knowledge simply gave us better questions and a better vocabulary for the answers.

This is why cybersecurity literacy is becoming part of the professional standing of business analysis. BAs who can contribute credibly to Govern, Identify, and Protect discussions are invited into the rooms where strategic decisions get made. The framework is teachable; the mindset is something BAs already have.

In the next article I will turn to Detect, Respond, and Recover, using a recent incident to show what happens when operational readiness is not where it needs to be. Those functions belong to other teams, but the artefacts they depend on are produced during change delivery.

Mark Cross *is a cybersecurity consultant, business analyst, and speaker. He is the founder of Envista Consulting and chairs the IIBA's Cyber Special Interest Group. Connect with him on LinkedIn at www.linkedin.com/in/markcross.*

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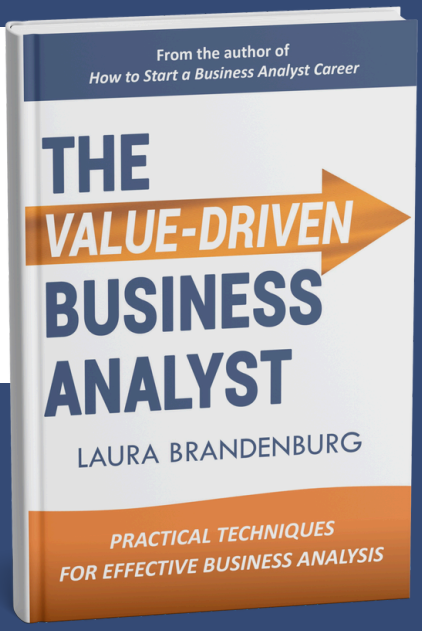
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Prompting like an Analyst: Why AI Is a New Core BA Skill

Anurita Ruscoe

When ChatGPT was first released to the public in 2022, many people including BAs treated it like a smarter search engine. Ask a question, get an answer, move on.

Within just a few years, with the evolution of tools like ChatGPT, Claude, Gemini and Copilot, something important has become clear. You get out what you put in! In other words, vague input equals vague outputs, while quality input creates quality outcomes.

Sound familiar? As good BAs know, effective prompting and good requirements rely on the principles of clarity, structure, context, and intent. The BAs getting the most value from AI are not necessarily the most technical. They are the ones applying the same structured, holistic thinking they already use in workshops, discovery sessions, and stakeholder conversations to their interactions with (and usage of) AI.

What Good Prompts and Good Requirements Have in Common

One of the biggest similarities between writing strong AI prompts and strong business requirements is that ambiguity creates poor outcomes.

Would you ever accept a requirement that says: *"Build a dashboard for managers."*

Probably not. Most experienced BAs would immediately start challenging it, because without clarity the team risks building something that fails to meet the real business need.

Questions would quickly follow:

- Which managers?
- What decisions are they trying to make?

- What problem are we solving?
- What does success look like?

AI works the same way. A weak prompt such as "Write user stories for onboarding" is almost guaranteed to generate a weak response that is unlikely to meet your needs.

Now compare that to a stronger prompt such as:

"Act as a senior business analyst supporting an agile HR transformation programme within a car manufacturing company. Create user stories for a new employee onboarding process using the format, 'As a [manager/employee], I want…, so that…'. The solution should focus on reducing manual HR administration while improving the employee experience.

Include acceptance criteria written in Gherkin format and consider both manager and employee journeys. In addition to the happy path, include relevant edge cases and exception scenarios for both roles."

See the difference? Context and outcomes have been added, helping to achieve precision and clarity. These are all core BA skills. Ultimately, the best prompts are not random questions. They are structured analytical inputs.

Common Prompting Mistakes Analysts Make

Many analysts expect AI to do the thinking for them, rather than using it to enhance their own thinking. As we continue to learn how to use AI effectively in both work and daily life, several common mistakes continue to appear.

1. Ignoring persona or role assignment: Telling AI to "act as a Senior BA" significantly changes the tone, depth, and relevance of the output.

2. Failing to provide business context: AI has no knowledge of your organisation, programme, or delivery pressures unless you explicitly provide that information. However, always remain mindful of confidential or sensitive data sharing. You should also ensure you are using tools permitted by your organisation, and are acting within the parameters of its AI governance policy.

3. Being too vague: Prompts such as "create process documentation" give AI no sense of scope, audience, or expected outcome. Without context, you often spend multiple iterations getting to information you could have guided upfront.

4. Overloading prompts with multiple tasks: Trying to generate user stories, process maps, test cases, and business cases in one interaction often creates shallow or inconsistent outputs. Ask for one thing well, then build from there.

5. Forgetting constraints: Budgets, timelines, regulations, delivery limitations, and governance considerations all influence what good output looks like. Include them.

6. Not defining the desired output format: Specify whether you want user stories, a table, a diagram description, a summary, or a structured list. Format matters.

7. Treating prompting as a one-off activity: Like good requirements, strong prompts are refined and iterated. The first response should be treated as a draft, not a final answer, and validated with the same critical thinking applied to any third-party input.

Most of these mistakes come back to one thing: a lack of structured thinking.

Structured Thinking as the Foundation of AI Effectiveness

There is a misconception that AI effectiveness is mainly about tools. In my experience, it is predominantly about thinking.

Strong analysts naturally break problems down before they act, and the best prompts work the same way. I have developed a framework called **COACH** to bring that structure into every AI interaction:

- **C – Context:** What situation are we working within?
- **O – Objective:** What outcome are we trying to achieve?
- **A – Audience/Actor:** Who is the intended audience and from whose perspective should the response be written?
- **C – Constraints:** What boundaries or considerations matter?
- **H – How should the output look?** What does good output look like?

That structure dramatically improves the quality of AI outputs.

AI is not just another search engine. When used properly, it becomes a thinking partner that helps analysts explore, challenge, create, test, and accelerate documentation.

Without structured thinking, prompting becomes little more than trial and error.

So, what does that look like in practice?

Designing High-quality Prompts with COACH

For example, rather than asking AI to simply "write user stories for onboarding," a BA using the COACH framework might structure the prompt like this:

- **Context:** Supporting an HR transformation programme within a manufacturing company
- **Objective:** Reduce manual onboarding administration and improve employee experience
- **Audience/Actor:** Write from the perspective of a senior business analyst and tailor the output for managers and employees
- **Constraints:** Consider regional data protection (such as GDPR) requirements, limited development capacity, and both manager and employee journeys
- **How the output should be structured:** Create user stories using the format "As a… I want… so that…" including Gherkin acceptance criteria and edge cases

The result is usually far more relevant, structured, and aligned to the actual business problem being solved. The same principles apply whether you are generating process maps, stakeholder communications, workshop agendas, or gap analysis frameworks.

The Analyst's Edge

In many ways, prompting is becoming a modern extension of business analysis. The strongest analysts of the future will not simply be the fastest document writers. They will be the ones who drive clarity, frame problems, provide direction, and combine analytical thinking with AI capability to create meaningful outcomes.

So perhaps the final prompt is this:

As a business analyst in an AI-enabled world, what outcomes are you really trying to create?

Anurita Ruscoe was a finalist for the BA of the Year Award 2025 and Founder of The Business Analyst Confidence Studio, which empowers BAs to lead with confidence, influence, and purpose. She leads a team of BAs and is passionate about redefining the profession in an AI-driven world.

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Combining OKRs and KPIs?

Allan Kelly

Two questions I am regularly asked are:

"How do I combine Objectives & Key Results (OKRs) with Key Performance Indicators (KPIs)?"

"What is the difference between OKRs and KPIs?"

In all honesty, I don't like these questions. I don't like them because I can't give a straight answer; I have to say "It depends." I'd never given much thought to KPIs until I wrote a book about OKRs and started getting questions about them.

So, I started to look at KPIs properly and discovered the dirty little secret of KPIs: there are no universal foundations. There are many books and articles about them, but there is no one founding piece. While everyone agrees that KPI stands for key performance indicator (and OKR for objective and key result), little else seems to be agreed on.

Answering these questions depends on how the term "KPI" is interpreted and used within an organisation. Broadly speaking, there are three types of KPI, and each type leads to a different answer for OKRs.

Type 1 KPIs: Informal

With Type-1 KPIs, teams and companies talk about KPIs and many

numbers are called *key performance indicators,* but there is no agreement on what the important *key* KPIs really are. Definition and measurement of the KPI may be vague and even subjective. Consequently, there are many *informal KPIs*.

With the increasing use of dashboards, this type of KPI is proliferating. The term is often applied to any old metric that somebody wants to aggrandise and stick on a dashboard.

If you have this type, you have two options, although you could choose to pursue both at the same time.

First: go right ahead and implement OKRs. Your KPIs are weak so OKRs should bring improvements.

Alternatively, or perhaps at the same time: sort out your KPIs. Start with three basics: reduce the number of KPIs you use, define what they are and how they are measured. Then create a low effort mechanism for collecting and sharing the results.

Type-2 KPIs Driving Action

Type-2 KPIs are formal and targeted. They are well defined and reported on. The company sets targets for KPIs and creates action plans to achieve those targets.

In this mode, KPIs aren't significantly different from OKRs. If this style of KPI is working well then why add OKRs? You need to understand why you would use both because they overlap. Adding OKRs may simply increase bureaucracy and costs. At worst you might set up conflicting goals.

Type-3 Monitoring KPIs



Figure 1 - KPIs monitor vital signs

Type-3 KPIs are my preferred sort. The thinking here is rooted in the *balanced scorecard* approach. Each KPI is well defined but they are not targeted directly. Rather, KPIs are used to monitor the organisation and check it is moving in the right direction and not getting out of balance.

Think of them as being similar to hospital monitoring instruments. The instruments tell you patient heart rate, blood pressure, cholesterol, etc. but just measuring and reporting those numbers does not bring control.

Here it makes sense to add OKRs to help direct the work: either work to improve the KPIs directly, or to pursue some other objective. Here KPIs allow long-term monitoring to see if changes are going in the right direction.

Type-3 KPIs are information only. OKRs facilitate planning, foster alignment and direct work. You don't say "Let's target lower blood pressure" you say: "Let's target a healthier diet" or "Reduced stress". The key results are leading indicators

which contain assumptions "if this number goes up then that number will go down." Conversely, KPIs are lagging indicators tracking performance, not actions.

Here KPIs and OKRs are complementary. OKRs change every few months as priorities and opportunities change. KPIs provide continuity over the long term.

Sticking with the healthcare example: Imagine your objective for the next three months is to get healthier. Key results might count vegetables and exercise. The assumption is that more veg and exercise will make you healthier, and in time blood pressure and cholesterol will fall.

Summary

The following flow chart summarises the three types of KPI and how you can go about combining them with OKRs. But please remember, this isn't buzzword bingo, it is not about ticking both KPIs and OKRs. Make sure you know why you use one technique or the other, or why you are using both.

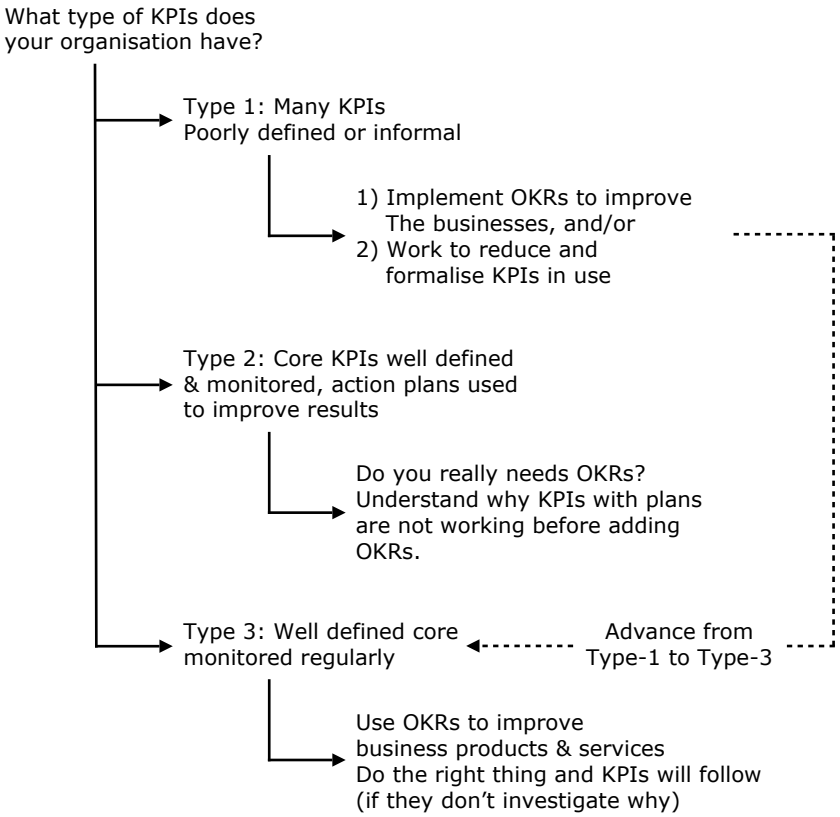


Figure 2 - Decision tree for combining KPIs and OKRs

Further reading

Allan Kelly has a longer version of this piece online at www.allankelly.net/writing/okrs/ where you can also find the results of a survey he ran on KPI usage.

Additional references consulted for this piece were *The Balanced Scorecard—Measures That Drive Performance*, *Harvard Business Review*, January-February. 1992, *Key Performance Indicators,* David Parmenter, 2020, and Allan's own *Succeeding with OKRs in Agile*. 2nd ed, 2023.

Allan Kelly is a digital leader with deep experience of product strategy and delivery. Successes include project rescue, business turn around and smoothing client-supplier relationships.

He is a regular conference speaker and author of multiple books "Succeeding with OKRs in Agile" and "Business Patterns for Software Developers".



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Beyond Sign-off: How Business Analysts Can Enable Meaningful UAT

Volha Pasvistselik



Every product, regardless of how good and detailed the requirements elicitation and prioritisation were, needs proof that it is progressing in the right direction. Best practices teach us to hold review sessions and regularly ensure that stakeholders expectations are aligned. In these sessions, progress is shown, future plans and ideas are discussed, and feedback is collected. But besides that, we need to understand if the product we're building meets the business requirements, satisfies the users' needs, and is clear and understandable and usable. At that

point we need User Acceptance Testing (UAT).

UAT is a set of activities where end users interact with the solution in conditions that are as close to real life as possible. The aim is to determine if the solution *really* meets the business requirements and needs, when taking into account 'real world' conditions and workflows.

UAT is most valuable when end-to-end features have been implemented and are ready for feedback from end users. The aim is to understand whether the feature meets user expectations: including whether the logic is correct, the goal is clear, and the experience is intuitive.

Even though the product will have been built according to approved requirements, UAT provides a "hypothesis check", and we have to be open for any feedback received.

Preparation Is Key

Successful UAT relies on the product team conducting adequate preparation. The first step is to define what should be included in UAT. It is helpful to prepare a scenario for the end user to follow. This can be a simple flow (such as registering for the application, creating an entity, navigating to a list of entries and finding the entity) or a more complex journey.

In some cases, particularly in financial applications, specific input data may be required to complete the scenario. For example, users may need to select or enter predefined values for certain attributes. This data should be prepared in advance and included as part of the scenario to ensure the task can be completed effectively.

It can sometimes be useful to append a short questionnaire at the end of a scenario. This can support later analysis, but it should be kept short and focused, such as asking for an overall satisfaction rating.

Preparation also includes *planning* where and how the testing will be conducted. UAT can be conducted in different ways: in groups or individually, online or in person. Based on the chosen format, it is important to agree on the time, location, and any required equipment. If users are expected to use their own devices, this should be clearly communicated in the invitation, along with any other prerequisites and a brief agenda.

We also need to decide in advance when and how feedback will be collected during or after UAT, and how support will be provided if a user gets stuck.

The planned duration of UAT sessions should include contingency time for users who may need additional support. It is important to be realistic when estimating timings. Analysts are familiar with the product and can complete tasks quickly, but new users will need more time. Allow them to work at their own pace without feeling rushed.

Another key part of the preparation is to identify the users who we are going to invite to participate. It's essential to invite people who are really going to use the application or the feature we plan to test. For

example if you are testing front-office functionality in a banking application, it would not usually make sense to ask the HR department to test it. Finally, ensure invitations are sent in advance and include a clear agenda.

Conducting the UAT

While end users are testing the application, there is still an important role for the BA to play. At the outset, it is essential to clearly explain the purpose of UAT and its goal. You should also ensure that users understand the scenarios they are expected to follow.

From experience, the most effective approach during UAT is to avoid interrupting or guiding users too closely. The goal is to identify unclear or "weak" areas in the solution. If a user appears confused, lost or unsure about the next step, this is valuable insight into where the product may need improvement.

Equally, you should be prepared to step in if a user becomes genuinely stuck. In such cases I recommend using leading questions that help the user to find a solution. But it's better to avoid giving direct instructions. If for some reason the user was not able to proceed without assistance, make a note of where this occurs. These moments often highlight areas of the application that require further attention.

Collecting Feedback

There are several ways to collect feedback during UAT. In one-to-one sessions, the most effective approach is to ask users to think aloud, describing what they are doing and what they are thinking as they work. These sessions can be recorded, or a business analyst can capture notes in real time.

In group sessions, this approach is less practical. Instead, business analysts should be available to support users if needed. The number of analysts involved will depend on the size of the group and the session format. Feedback can then be gathered in a follow-up discussion immediately after the session, either in a group setting or individually.

While written feedback is also an option, verbal feedback often provides greater insights. To support ongoing input, it is important to establish a clear communication channel so users can share feedback at any time, including after the session has ended.

Feedback could be collected in a separate document or backlog. When capturing feedback, be sure to document who requested the change, when, and its context. Each item should then be carefully analysed before being prioritised or, where appropriate, declined.

In summary, UAT is a powerful way to identify if a product is on the right track, to check the hypothesis, to receive feedback from end users, and also (crucially) to show that users opinion is valuable and considered.

Volha Pasvistselik is a Senior Business Analyst, and holds CBAP® and CPOA®. You can contact Volha on LinkedIn at: www.linkedin.com/in/volha-pasvistselik/

Understanding the Impact of Pricing Changes: A Business Analysis Perspective

B. Stanley Sampreeth Kumar



As a consumer, receiving an email that says, *"We are updating our pricing"* often feels like a minor inconvenience. You might notice your monthly streaming bill increase or see a new "pay-per-view" option introduced. On the surface, the requirements may seem simple: to update a pricing value within the system. However, when viewed holistically through a business analysis lens, this seemingly small change has a much wider impact across systems and processes, often in ways that are not immediately visible.

While pricing decisions are usually made to increase revenue or stay competitive, their execution typically spans multiple systems, processes, and data flows. Without alignment, even a minor pricing update can create inconsistencies that ripple across the organisation. This can have unintended consequences for both customers and internal stakeholders.



Example: Changing Pricing Model

Let's take the example of an organisation moving from a flat subscription model to a usage-based structure. This will have a wide-ranging impact. Systems that were built to process fixed, recurring charges now need to handle variable inputs such as usage volumes or activity-based metrics. This introduces dependencies on accurate data capture, transformation, and reconciliation.

If contract definitions, billing logic, and reporting outputs are not aligned with this shift, discrepancies begin to surface. Invoices may not reflect intended pricing logic; usage data may not reconcile with billing calculations, and revenue reporting can lose consistency. These gaps will cause significant issues and complaints.

Where Do These Operational Gaps Originate?

These gaps typically originate from how business intent is translated into system behaviour. This is often a deficiency in how the requirements and associated business rules are articulated. Too often they are defined at a high level, but the detailed definitions are omitted.

This leads to requirements artefacts that lack precision, resulting in different interpretations. What is understood as a pricing rule at the business level may be implemented differently at the system level. This risks creating fragmentation, where each component appears to behave correctly in isolation but fails to align as a whole.

The issue is not the pricing change itself, but the clarity with which its logic is defined and carried across systems.

How Does a Business Analyst See the Big Picture?

A BA approaches a pricing change by looking beyond individual system updates and focusing on how the change flows across the entire business. A pricing decision does not stay within the billing system; it influences how contracts are defined, how data is captured, how calculations are performed, and how outcomes are reported. Each of these steps is connected, and a gap at any point can create inconsistencies downstream.

From this perspective, the analyst's role is to trace how a pricing rule moves through the system. What starts as a business decision will require changes across different layers:input, processing, and output. Ensuring that the logic remains consistent across these stages is critical, as even a small misalignment in interpretation can lead to incorrect invoices or unreliable reporting.

Seeing the big picture, therefore, is about connecting these dependencies rather than viewing them in isolation. It involves understanding how processes, data, and stakeholders interact, and recognising that an issue observed at one stage often originates elsewhere. This end-to-end

view allows the business analyst to ensure that changes are aligned across the system and produce consistent outcomes.

What Tools Bring Clarity to Potential Chaos?

Clarity comes from structuring ambiguity into defined logic. The IIBA® Business Analysis Body of Knowledge (BABOK®) Guide emphasises the importance of requirement analysis and design definition, and this is one key set of practices which ensures consistency.

For example, process mapping helps visualise how workflows operate and where pricing changes take effect, while understanding data flows ensures that inputs, transformations, and outputs remain aligned. Most importantly, defining business rules with precision removes interpretation gaps. Instead of stating that customers should be charged based on usage, the logic must clearly specify thresholds, rates, and calculation methods. This level of clarity enables predictable system behaviour.

Can We Prevent the Need for Manual Corrections?

After pricing changes, there is sometimes a period where manual corrections to bills are necessary. This need for manual intervention often stems from gaps that were not addressed early. By validating how data flows through systems and considering edge cases such as mid-cycle changes or prorated calculations, many of these issues can be minimised.

Clear acceptance criteria and well-defined scenarios ensure that expected behaviour is understood before implementation. This reduces downstream inconsistencies and supports more stable operations overall.

Ultimately, a pricing strategy only delivers value when it is executed accurately across systems and processes. The challenge is not to decide the price, but to ensure that every part of the system reflects that decision consistently. A BA mindset plays a critical role in bridging this gap—bringing structure to ambiguity, aligning systems with intent, and ensuring that changes work cohesively across the entire business flow.

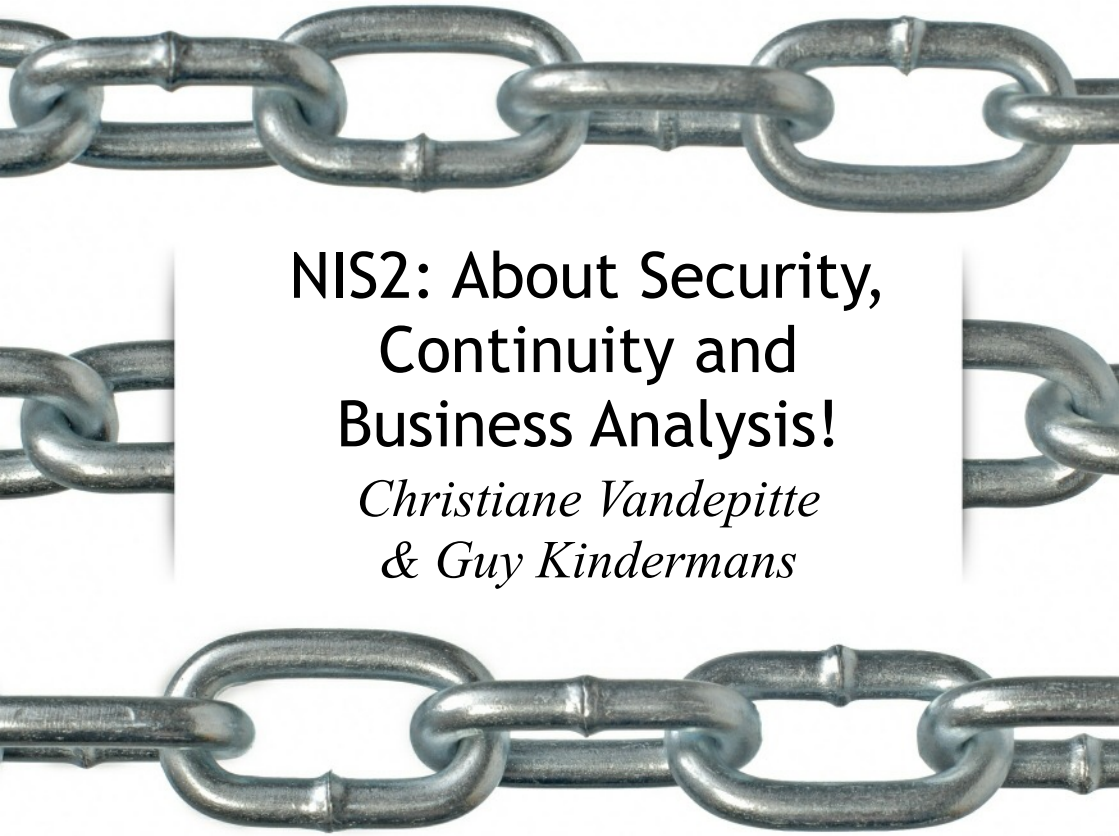
B. Stanley Sampreeth Kumar is an aspiring Product and Business Analyst focused on systems, processes, and data-driven decisions. He works on independent case studies and collaborates with product owners and analysts to explore real-world business problems.

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NIS2: About Security, Continuity and Business Analysis!

Christiane Vandepitte & Guy Kindermans

The European directive 'NIS2' focuses on strengthening cybersecurity, but ultimately, it's about ensuring business continuity. What role should business analysts play in this?

The importance of information systems for business operations is widely recognised. Indeed, companies deprived of their IT systems for any length of time may simply cease operations and disappear.

It is therefore hardly surprising that the European Union has already published a second version of the Network and Information Security (NIS) Directive, with the aim of strengthening the cybersecurity of organisations that play a key role in the smooth functioning of society. This also applies to other companies that form part of the value/supply chain. The importance of these companies can be such that their failure can result in societal disasters.

Why the Business Analyst?

Cybersecurity? That's a job for the security experts, isn't it? Yes, but not just them. When tackling a company's overall cybersecurity, they need to understand which elements of the systems are important for the smooth running of the business. Who

can tell them where these elements appear in processes and solutions? The business analyst!

After all, the BA knows better than anyone which elements ensure the smooth running of processes and solutions, and what the consequences might be if things go wrong. The BA is often the only person with a complete overview of the process and the associated solution and is therefore best placed to identify and report specific risk points.

How?

The BA role typically involves a functional analysis of the needs of business users and owners. Today, however, focusing solely on functional analysis is no longer sufficient. The responsibilities of the BA now extend further.

Nowadays, the BA must also consider the 'context' of these processes and solutions: external obligations such as (sector-specific) regulations, laws and more. This includes aspects such as privacy—for example, the General Data Protection Regulation (GDPR)—or provisions in other European legislation (AI Act, Data Act, NIS2, etc.). As well as abiding by their non-European and possibly national counterparts. The importance of this context is indeed explicitly emphasised in version 2.0 of the IIBA® Business Analysis Standard.

As a result, the focus is not only on what is needed, by whom, when and where, but also on the nature and criticality of the elements in the processes and solutions. Which 'contextual' aspects apply to them? What specific requirements and provisions are needed as a consequence (e.g. in the event of misuse, loss, etc)? Regarding NIS2, BAs must consider not only the requirements within a NIS2-category company, but also in companies further up and down the related value chain. (For specific 'to do's' and measures, see Article 21 of the NIS2 Directive)

What?

The business analyst must identify and point out in their analysis document the elements and points in a process or solution that require protection and extra attention to ensure secure and compliant operation (including response and escalation processes in case of incidents). This is why business analysts must not only know how to address functional requirements, but also be aware of contextual aspects such as security, privacy, governance, regulations and legislation, as well as anything else that may be relevant in a particular sector.

While leaving the concrete implementation of security measures and other provisions to the relevant (e.g. security) experts, the business analyst must present a complete overview of all elements where any 'context' is applicable. Therefore, the BA should consider these aspects from the earliest moment of an analysis process and throughout its entire duration. It should not be an afterthought, because often there is 'no time' left by then. Also, the BA may have simply not asked the right questions when interacting with users and owners.

Risk Management

Regulations, laws and the like—such as NIS2—often start from a 'risk' perspective. This involves identifying potential risks, assessing their possible severity, probability of occurrence, and potential impact (for example, risk relating to turnover, liability, penalties, fines, or loss of customer trust, market value and market share).

Therefore, every development and analysis process must begin with a risk analysis/assessment, depending on aspects such as process criticality, context and technologies. This is a team effort involving the business owner, users, risk manager, specific experts… and the business analyst, who takes a 'helicopter view' of the process under consideration. Naturally, the BA must continue to consult experts throughout the whole analysis process, including talking to parties across the company's boundaries.

In short, unfortunately, this is an additional must for the business analyst's toolkit: an understanding of risk management.

Business Continuity

Ultimately, all the points made so far lead to a single conclusion: what really matters is 'business continuity'. Companies and their supply chains must be able to continue delivering products and services, especially if they are vital for the smooth functioning of society and the economy.

Actually, this concerns every process and solution within a company. A process or solution may not be critical in its own right, but it is still part of the company's internal chain of processes and solutions. Whilst its malfunction might not be fatal, it can still disrupt the smooth overall operations, causing problems elsewhere. Indeed, the 'root cause' of a fatal problem is often several steps removed from the problem itself. The old saying of 'a chain is only as strong as its weakest link' always applies.

If all of this sounds like an insurmountable burden on the shoulders of a business analyst, don't despair! It is not necessary for business analysts to be thorough experts in all of these 'context' areas. The functional aspect of the analysis is still key to creating business value.

Aim to be aware of contextual aspects throughout the whole analysis process, right from the start. Begin by identifying which contexts are relevant to your field of work. Then acquire the necessary basic knowledge. Consider obtaining an appropriate certification. Above all, seek advice from people who can help you during the analysis!

Christiane Vandepitte is an experienced software designer, and Guy Kindermans is an experienced ICT journalist. Together they give presentations to explain the GDPR, NIS2, the AI act and other EU laws to people who are new to the subject and want/need to understand.

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Taking Things Personally

Nick de Voil

What is an organisation, exactly? What makes it different from, let's say, a cabbage or a motorbike? We could respond to this question by talking about function, or structure, or legal status, or economic aspects. But ultimately the answer is very simple: an organisation is basically a collection of *people*.

When you think about your working day, very likely you think about things like email conversations, meetings, Teams calls and instant messaging. What these all have in common is two things:

- They involve one or more *other people*;
- They involve *you*.

You may find particular instances rewarding, stressful or annoying—or even all of these at the same time. There's an obvious surface-level explanation for that. Regardless of the subject matter of the specific interaction, you're always trying to find out information, get a point of view across, reach agreement or similar. This of course requires co-operation from the other participants,

and on any particular occasion you may find that forthcoming, or you may find it lacking in some way—they don't listen to you, they don't have the information you need, they don't see the merit of your arguments etc. So other people can help or hinder you in the work you're doing.

Identity

But there's also a deeper explanation for the emotional reactions we sometimes experience. However interesting we may find the subject matter of the work, what most of us really care about is the human beings in the situation—ourselves included. That's partly because every interaction with others has the potential to either challenge or reaffirm our deeply held sense of identity. Identity includes aspects such as:

- What **sort of person** are you? What are your strengths and weaknesses?
- What sort of **behaviour** do you engage in?
- Which **groups** are you part of, and which are you not part of?
- In any given group, what is your **status**—are you respected as a long-time member, a leader or subject matter expert, or are you a relatively unimportant member?

We might think that these are internal attributes of the individual themselves, but in fact we co-create our identity with other people in a reflexive process: their perception of us creates expectations, which we live up to, which creates more expectations and so on. However, sometimes a conflict arises between our own perception of our identity and the perception that others seem to have. This causes psychological discomfort and stress. Arguably, the people we find it most rewarding to work with are the ones who support our self-image, and the most annoying people are those who challenge it.

The clear implication of this for a business analyst working with stakeholders is that it's important for us to try to understand what each of them sees as their identity. We need to avoid compromising it, either by the way we interact with them directly or by our words and actions with the wider stakeholder group, and if possible we should aim for the opposite.

Constructs

Group Construct Analysis (GCA) is concerned with the way that groups understand the world. Each group and each individual has their own construct system, which is the set of ideas or categories that they use for making sense of things. An individual has a personal construct system (see Article 1), which makes sense to them and doesn't necessarily make sense to anyone else, although most individuals' constructs are closely related to those of the group(s) to which they belong. The elements of identity listed above are all examples of constructs.

The constructs in a group's construct system play an important role in the way that members of the group relate to each other. In a group setting, a construct is used as a type of

currency. Members of the group use constructs to assert and develop both their individual identity and the identity of the group. You could say that a construct is a *vector* which allows individuals to negotiate and re-negotiate their roles in the group and their relationship with each other. This might sound abstract, but it's actually the underlying mechanism which describes much of what's going on when people interact.

Analysing Conversations

We can analyse any conversation (see articles 19 and 20), whether it unfolds over in a few minutes or over a matter of months, by seeing it as a series of movements by the participants. The pioneering psychoanalyst Karen Horney described three basic ways that an individual might relate to others: moving towards them, moving against them and moving away from them.

- **Moving towards** someone is an act of solidarity, indicating that you're both on the same side.
- **Moving against** someone is an aggressive move, signalling that you are willing to oppose them.
- **Moving away** from someone is a passive, neutral move, where you withdraw from engagement.

The words that are spoken in the conversation are the most basic raw material that we can analyse to see this happening. I often use the AI-generated transcript of a meeting as the starting point for what I call a **texture map**, which looks like figure 1 (below).

On the left-hand side we have the transcript, listing the **actors** (participants) and their interventions. In the case of a meeting, mostly this is simply the things that people say. When you're analysing interactions that take place on a broader canvas over a longer period of time, it could include other things, most notably people's **actions**. On the right there are columns which indicate the people or groups that the participants might be moving towards, against or away from. In each column, there is a symbol showing the type of action. I use a ">" for moving towards, an "X" for moving against, and a "<" for moving away. On the far right there is a column for notes about which construct(s) is/are being used as the vector for the movement.

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JB	xx xxxxxx xxx xxxxxxxxx xxxx xxxxxxxxx xxxxx xxxx xxxx						
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Figure 1: a texture map

The BA's Role

One of the most helpful ways a business analyst can contribute to the conversations in an organisation is by providing an impartial and objective perspective. However, our interventions are likely to be more effective if we understand and can navigate the complex undercurrents that are carrying our stakeholders along.

Nick helps organisations create people-oriented systems, products and services. He's trained thousands of professionals in business analysis, user experience, facilitation, systems design, project management and agile development. Nick is author of "User Experience Foundations" and is working on a book about GCA.

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Before You Improve, Understand: Why Current-State Clarity Matters

Sara Kroger

When organisations set out to improve a process or system, the instinct is often to jump straight into solutions, especially when deadlines and expectations are already set. While this instinct is understandable, it will often lead to solutions being deployed that don't solve underlying problems. If we do not know the *outcomes* that a group of stakeholders are aiming to achieve, it's impossible to determine whether a set of *solutions* will actually help achieve them.

Think about how a mechanic tackles a car problem. They don't start replacing parts without understanding root causes and checking what's really going on. They look under the hood first. They start with the current state. The same logic applies to how BAs approach change.

In many organisations, there is constant pressure to act fast. Pain points are identified, a solution is pitched, and momentum builds. Before long, the solution feels certain, sometimes before anyone has examined what is actually happening today.

One of the greatest strengths of the BA role is the ability to pause and ask a deceptively simple question: *"What do we actually do today?"* And when we take that step back, what we uncover is often surprising.

What We Discover When We Look Under the Hood

Picture this: you've been asked to provide requirements for a new system enhancement that's supposed to help multiple teams. You start by mapping out current workflows and exploring how users interact with the process, both inside and outside the system. You talk with developers, examine the technical details, and circle back to validate where the business process meets system functionality. Then, somewhere along the line, you may find one of the following:

The system already does it: Change moves fast, and organisations do not always keep pace with every update or configuration. In some cases, what people are asking for may already exist, just in a slightly different form or location within the system. Other times, the functionality is there, but users are not aware of it or have been working around it outside the system. In these cases, the gap is not capability; it's awareness.

The enhancement isn't feasible: Through analysis, you may uncover that what is being requested simply isn't viable. That can happen when:

- The cost outweighs the benefit
- Technical constraints make it impossible
- Regulatory limits stand in the way
- Integration dependencies require other changes first
- The timing is wrong in the broader portfolio or roadmap
- Or, sometimes, the solution's complexity makes it better left as a manual process

The real problem is different: Sometimes, the proposed solution does not address the real issue at all. Once you have examined the current state, you might find that what looked like a system problem is actually a process bottleneck, or that data is being misread. Workarounds can hide deeper issues, and what seems urgent on the surface might only be a symptom of something else entirely.

It's a workflow issue, not a technology one: More often than we might expect, the technology is not the problem; how we work is. A few duplicate steps here, extra approvals there, unclear ownership, or policy grey areas can all slow things down. When we map the current state clearly, we often realise that improving the workflow, rather than the system, is the real opportunity.

Balancing Urgency with Understanding

Even when everyone recognises the value of current-state analysis, the push to move fast is real. In these situations, the BA's goal is not to slow things down, but to make sure we are solving the right problem.

A few simple approaches can help keep that balance:

- **Frame analysis as risk reduction:** Instead of asking for more time, position the work as

a way to avoid rework or missed requirements later.

- **Keep it proportional:** Not every current-state review needs a deep dive. Tailor the effort to what is needed most, since stakeholders appreciate a pragmatic approach.
- **Use visuals for clarity:** A workflow diagram or process map can quickly uncover gaps, align understanding, and often replace long meetings. Sometimes seeing really is believing.
- **Anchor back to outcomes:** Remind stakeholders that your goal is to enable better decisions, less rework, and real results. You are not slowing progress; you are guiding it in the right direction.

Clarity Sharpens Change

Understanding today is not a delay—it is the foundation for tomorrow's success. When we truly see how things work, we make smarter choices, target real issues, and create lasting improvement.

Before you improve, take the time to understand. We cannot change what we do not fully know. This is where business analysts add some of their greatest value: slowing the rush to solutions just enough to make sure we are solving the right problem.

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The AI Model Doesn't Know Your Domain. You Do.

Gottfried Szing

A business analyst opens an AI assistant and types a typical prompt for generating acceptance criteria following the Gherkin syntax (given, when, then). Seconds later the AI returns with perfectly correct (but completely abstract) acceptance criteria:

```
"GIVEN an entity, WHEN the person pays, THEN the end date is increased"
```

Technically this is valid, but in practice it is completely meaningless. Now imagine the same prompt, but this time the business analyst has used the domain glossary like "policy", "policy holder", and "renewal". The result looks very different.

```
"GIVEN a policy, WHEN the policy holder pays the renewal, THEN the policy is valid for another year"
```

The difference between these two results does not depend on the AI model, it is the language and the context the Large Language Model (LLM) had. And this is precisely where the power of Domain-Driven-Design (DDD) comes in.

The Promise of AI

There is no longer a question about what AI can generate: user stories, acceptance criteria, diagrams, OpenAPI specifications, database models, test cases... all within seconds. All within the reach of a prompt typed into the user's favourite AI. The speed gains are real, and teams ignoring it are falling behind.

But speed without accuracy leads only to fast failure and not to fast success. AI introduces a dangerous and often overlooked trap: the result looks coherent and plausible, but it is often semantically broken. A data model with attributes named 'status', 'value' or 'name' will pass the syntax check, but it won't survive first contact with a domain expert.

The cause for this is the inaccuracy and ambiguity of the language used

for the prompt. Vague inputs generate plausible looking nonsense. A precise, domain-specific input results in valuable artefacts.

This is not a new problem, it is exactly what was DDD trying to solve. This started a long time before LLM.

A Quick Refresher of DDD

DDD was introduced in 2003 by Eric Evans in a book entitled "Domain-Driven Design: Tackling Complexity in the Heart of Software". It hinged on a simple but brilliant idea: the language of the business should be the language in the code. No more translation between business and developer, no interpretation. There should be one glossary used by everyone, from business owners to the developers.

It hinges on two key concepts:

- **Ubiquitous language:** is the shared, precise vocabulary which has been agreed upon by domain experts and the technical teams. It is neither an artificial language nor only the language of business or developers. It is the language of all. There is no longer a generic *user*, but there is a *customer*, an *employee*, an *administrator,* or a *policy holder*. Terms that are used consistently everywhere.

- **Bounded context:** defines the area of application within a given term that has a specific meaning. A "policy" for the bounded context "insurance" (where it relates to a contract of insurance) has a different meaning than in the context of "HR", where it relates to some form of rule or guideline. A bounded context guarantees that a term's conceptual meaning remains consistent within its boundaries. A bounded context therefore also provides a boundary of consistency.

DDD has often struggled and is still struggling with its adoption outside of IT. It is perceived to be too heavy-weight, too academic or too developer-centric. BAs who have advocated it might've been confronted with resistance, since there was no real argument for using it.

The rise of generative AI now offers a more compelling argument for its use than ever before.

Ubiquitous Language as Prompt Layer

LLMs are language models. They don't understand your (or any) business. They pattern-match on the language you provide in your prompt. This means that the clarity, the consistency, and your precision in your prompt directly determines the quality of the answers produced by AI.

Without a bounded context, an AI assistant asked for a data model of a "policy" could (without further clarification) result in a policy for HR or for an insurance company. Or a mixture of it, reflecting partly an HR policy with attributes of an insurance policy mixed in. AI cannot guess which "policy" was meant and AI cannot resolve this ambiguity.

But your ubiquitous language can. A well-maintained ubiquitous language acts as a clarifying source. Define it

once and use it everywhere for your prompts. It propagates across all artefacts the AI generates: user stories have *employees* and *administrators* instead of *users*, database columns reflect the domain attributes, OpenAPI specifications use verbs of the business, test cases generated have a meaning to business.

And all because you have defined the language once and in one place. The AI assistant does not know your domain. DDD is how you teach it.

The New Role of the BA in an AI-augmented Team

AI is not a simple tool, it became a sparring partner. You ask an AI assistant questions and hope for appropriate answers, you task it with mundane assignments, let it generate your code and you can use it for rubberducking. The existence of AI shifts the role of a BA into a different direction.

Defining, maintaining, and evolving the ubiquitous language has become one of the most important activities a BA can perform.

In practice this means facilitating workshops to agree on the language and the bounded contexts, maintaining a glossary that feeds into the AI toolchain as context, and validating the results of the AI no longer for syntactical correctness, but for domain consistency and correctness.

A BA must validate if the results really reflect the business. Does this follow the rules of business? Is this really the intent? Does this really reflect how the business works?

It is a clean and a very important separation of concern: the LLM handles the syntax, the BA owns the semantics.

Conclusion

With a domain glossary in the hand of all team members, the same prompt produces output that a product owner can understand, the developer can implement and the tester can use as the basis for test cases. And in addition: new members can understand the domain without a complex on-boarding process.

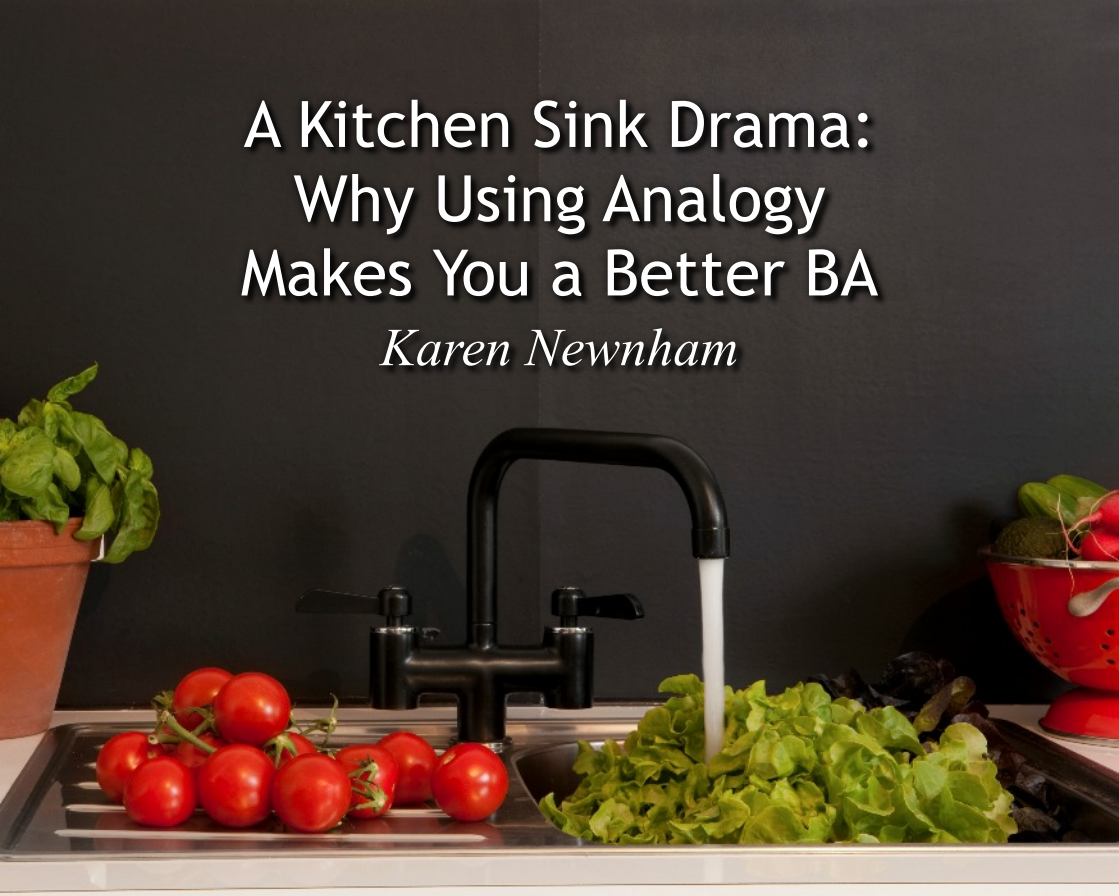
LLMs don't make the BA and domain modelling obsolete. LLMs make it impossible to hide the fact of missing domain understanding. Every team that skips this important step of domain discovery will generate technical perfect solutions, but in the end produces incoherent results.

The teams using an unclear language will not thrive, no matter what AI model they use. The ones with a well-defined domain will have an important advantage and DDD gives it to you. And AI gives you a reason to invest.

Gottfried Szing is a freelance Business Analyst / Software Architect with 20+ years of experience bridging stakeholders and developers. He serves on the board of IIBA Austria Chapter and co-founded the meetups Requirements Engineers and Business Analysts Vienna, DDD Vienna and Microservices, Reactive and Distributed Systems Vienna.

A Kitchen Sink Drama: Why Using Analogy Makes You a Better BA

Karen Newnham



I have used analogies throughout my career to explain things to others. I read somewhere that we take in new information easier when we can relate it to a subject we already understand. I don't know if there is much evidence, but many people have told me they find my analogies helpful.

I also use analogies to improve my own work. Thinking about how different common situations may relate to your work can provide new insight and understanding.

As an example, let's see how thinking about the practical and emotional journey of a kitchen installation helps you understand how your stakeholders engage with software delivery. Human nature acts in a similar way whether you are choosing cupboards or managing a call centre!

Phase 1: Sales—The Allure of Features

Last year I decided I wanted a new kitchen. I started by visiting several companies to speak to their salespeople.

Each salesperson tended to ask me questions about preferred styles, colour and finish. They were also

keen to show me the latest trends and innovations.

At one meeting I was also asked what I didn't like about my existing kitchen and I said I found the gas hob difficult to keep clean. An induction hob was recommended with an easy to clean glass surface. I came away with designs and cost estimates.

But what wasn't discussed in detail was my current kitchen space. The emphasis was more on what I wanted, not what was possible.

BA Takeaway:
The first conversations a stakeholder will have about solving their problem is often with a salesperson. Their initial discussions will likely favour features over feasibility, and your stakeholders could become emotionally invested in a specific solution before knowing if it is achievable.

Stakeholder conversations will be more successful if you understand what information they are working with.

How often have you seen a stakeholder fall in love with a solution before the constraints are clear?

Phase 2: Feasibility—Reality Bites

Once I'd chosen a design, a senior fitter visited to assess the kitchen.

Paul assessed my kitchen thoroughly, measuring at multiple points and checking the position of utilities—gas, water and electricity—in the room. He compared all of this to the design from the sales phase.

He had a lot to say about the design versus the reality.

- I had chosen wall cupboards to reach the ceiling. However, my ceiling was not level enough to create a good finish. I would end up with an uneven gap that would draw the eye and make the cupboards look like they had been badly fitted.
- The electric induction hob would require a significant upgrade to wiring to provide enough power.
- A floor to ceiling cupboard on the plan would need to be handmade, increasing the cost.

The wall cupboards flush to the ceiling were a major design feature I had fallen in love with in the design. Paul explained I could re-level the floor and the ceiling, but this would involve a lot more cost and mean the kitchen would be out of action for twice the time I was currently expecting. And he couldn't guarantee the work would fix the issue.

The rewiring for the hob would require new cabling to be run from my fuse box at the front of the house to my kitchen at the back. The cable would need to go through the dining room that I had recently redecorated.

If I wanted a standard cupboard instead of the bespoke one, then I would need to move the kitchen doorway.

Paul's reality check: uneven floors, costly rewiring, and bespoke units that would inflate the budget gave me much to think about. Some features I'd thought were possible now proved impractical or expensive. I had to

reconsider what mattered most. I'd also convinced myself I could afford the changes—now I wasn't so sure.

BA Takeaway:
Feasibility reviews force stakeholders to make tough choices. Practical constraints demand prioritisation and flexibility. An initial cost estimate also may have anchored stakeholders to a specific cost making cost increases hard to swallow.

The BA's role is to ease these conversations, using tools like prototyping or early technical assessment, and to help stakeholders reflect on what's essential.

How can you help stakeholders let go of their dreams and work with reality?

Phase 3: Resolution – Compromise and Delivery

After an agonising week of reflection, I settled on a revised plan.

Wall cupboards: I realised that I was more invested in the look this would give to my kitchen than needing it for any practical purpose. It was true that this feature would give me more cupboard space, but it would be difficult for me to reach, and now my children no longer lived at home the current level of storage space was fine.

Hob: I had chosen this type of hob as it would be easy to clean. I hadn't realised that to make them work I'd need to update my electrics. When I reflected, I was happy to clean a gas hob rather than do more redecorating work!

Cupboard: A standard cupboard would require a change to the doorway—incurring more cost and requiring a different tradesperson. I felt better about the extra cost of the cupboard when I compared it to the alternative.

BA Takeaway:
Stakeholders may need help to feel ok with the decisions they have made and rationalise why the new version is better.

Change management and stakeholder engagement frameworks can help BAs support stakeholders through the emotional journey of compromise and acceptance.

What positives does the new direction bring for stakeholders?

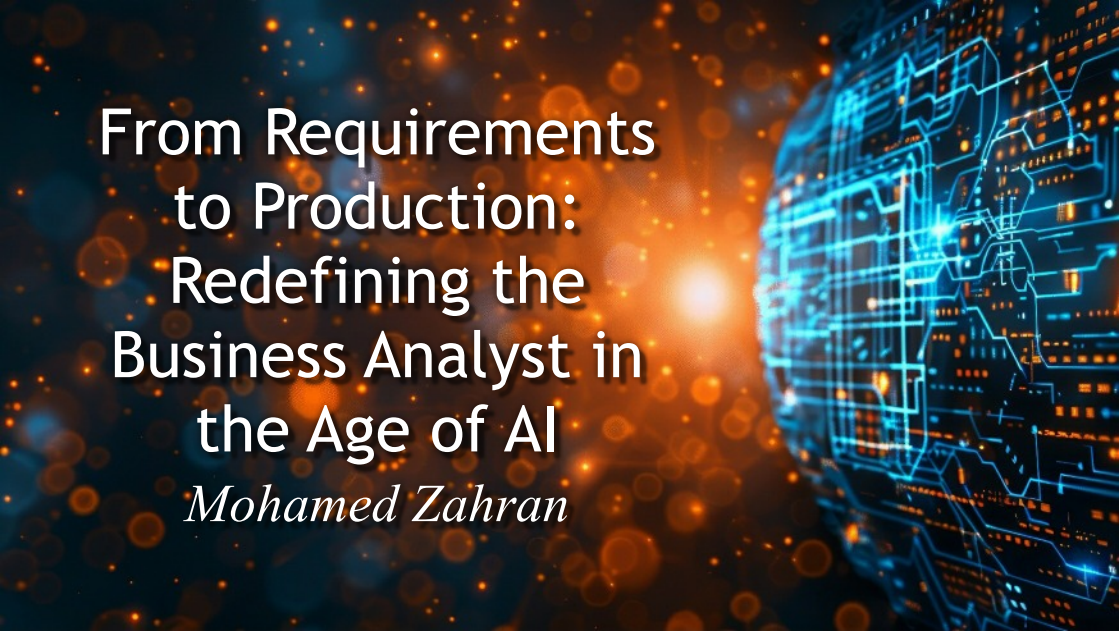
Conclusion

Remember, when your stakeholders are frustrated with cost and feature changes, they are experiencing the same thing we all go through during this kind of decision making.

Think back to when you had to choose something new (like a kitchen). This will help you to be more empathetic with your stakeholders and find ways to support them throughout the change process.

Karen Newnham is a change professional who uses practical thinking and storytelling to help people see problems differently and improve how change is supported. She is the Professional Development Director at IIBA UK.

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From Requirements to Production: Redefining the Business Analyst in the Age of AI

Mohamed Zahran

In my view, most conversations about "AI and the BA" focus on the wrong question. The real shift isn't what BAs write—it's how requirements themselves must evolve when AI becomes part of delivery. Here's what I learned building a production system across 60+ countries with two AI coding agents.

In recent years, BAs have asked: "What will happen to the BA role in the age of AI?" I initially believed the role would focus primarily on defining clearer requirements for AI systems, ensuring solutions are secure, ethical, compliant, and aligned with real human and business needs. That remains true, but the shift goes deeper.

The first question a BA must ask is not "how can we use AI?" but "does this solution really need AI?" Not every business problem needs a model, agent, or chatbot. Some problems are better solved through process redesign, clearer rules, better data, integration, automation, or improved user experience. Adding AI where it is not needed can increase cost, complexity, security exposure, privacy risk, and operational uncertainty without creating real value.

When AI is justified, the BA must define specialised AI requirements: model purpose, data sources, human oversight, confidence thresholds, explainability, audit logs, output validation, fallback procedures, and monitoring.

My Journey with AI

My own journey started with using AI to accelerate BA work. Since the rise of generative and agentic AI models, I have tested how AI can reduce time spent producing artefacts, freeing up more time for collaboration, validation, and stakeholder alignment. The results

were promising. AI reduced my artefact delivery time by approximately 40%, a conservative estimate, across activities such as drafting requirements, generating user stories, producing process flows, supporting test scenarios, and improving documentation workflows.

However, the bigger lesson was not speed. The real lesson was that the requirements package itself must change when AI becomes part of the delivery process.

AI coding agents do not work effectively when solely fed business requirements. They need structured context, clear boundaries, implementation sequencing, validation rules, security constraints, review checkpoints, and explicit instructions. Requirements must not only be understandable but also executable, testable, and governable.

This matters because AI delivery failures are not only technical issues. Research from RAND Corporation suggests that more than 80% of AI projects fail, while MIT NANDA's State of AI in Business 2025 Report found that 95% of organisations surveyed were seeing little or no measurable return from their generative AI investments

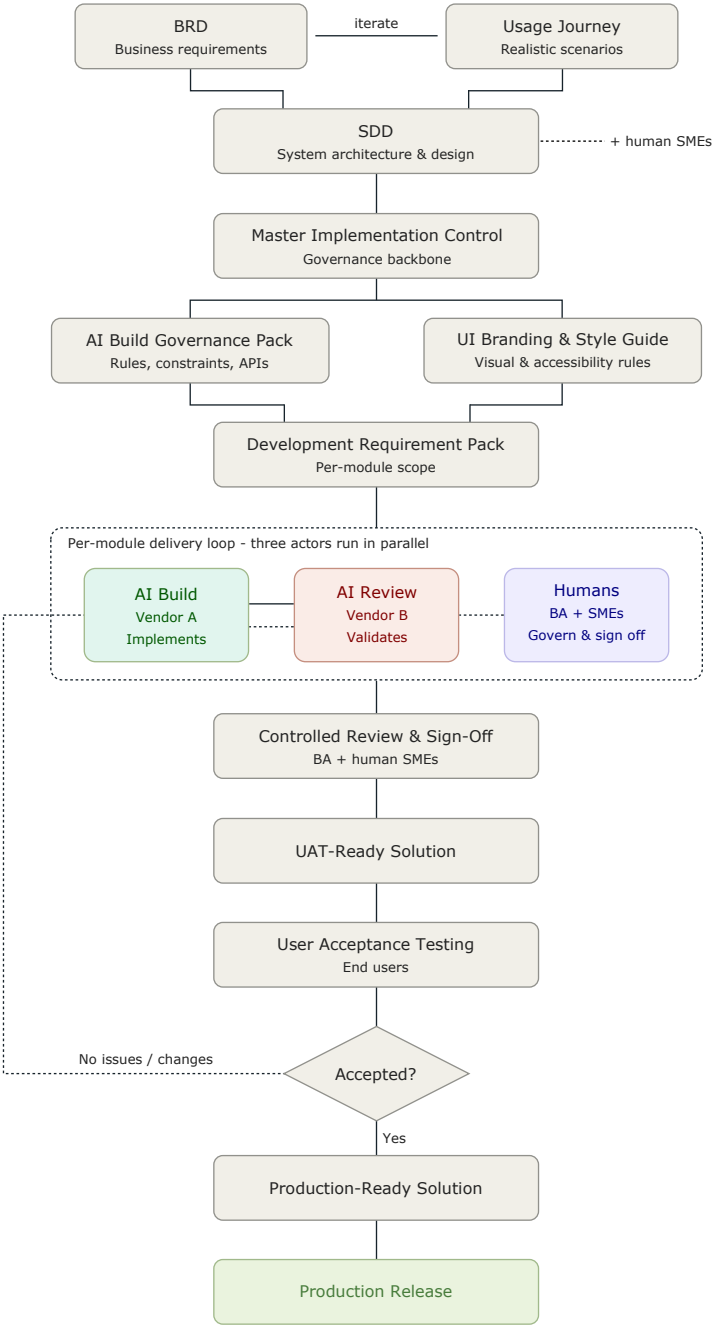
An Experiment Shaped My Thinking

One experiment that shaped my thinking happened during a normal business analysis engagement. I used a commercial AI tool to build interactive prototypes, demonstrate the proposed solution, and obtain sign-off. The process was faster than traditional approaches, so I went beyond standard documentation and added solution details: data protection, process-level security, business logic, test data, operational requirements, and delivery assumptions.

Under the traditional BA model, this could have been the end of my work. The requirements were signed off and ready for handover. But I realised that a signed-off BRD was still not ready for AI-assisted implementation. It had been written for human teams, not AI coding agents operating within controlled delivery boundaries.

That was when I redesigned the requirements package. Over 190+ working hours, I translated the requirements into a structured, modular delivery framework capable of turning business requirements into controlled AI-assisted implementation. My last real coding experience was almost 15 years ago, so I did not approach this as a developer replacing developers. I treated the AI coding agent like a software development team: with clear requirements, structured guidance, design constraints, testing expectations, security controls and continuous review.

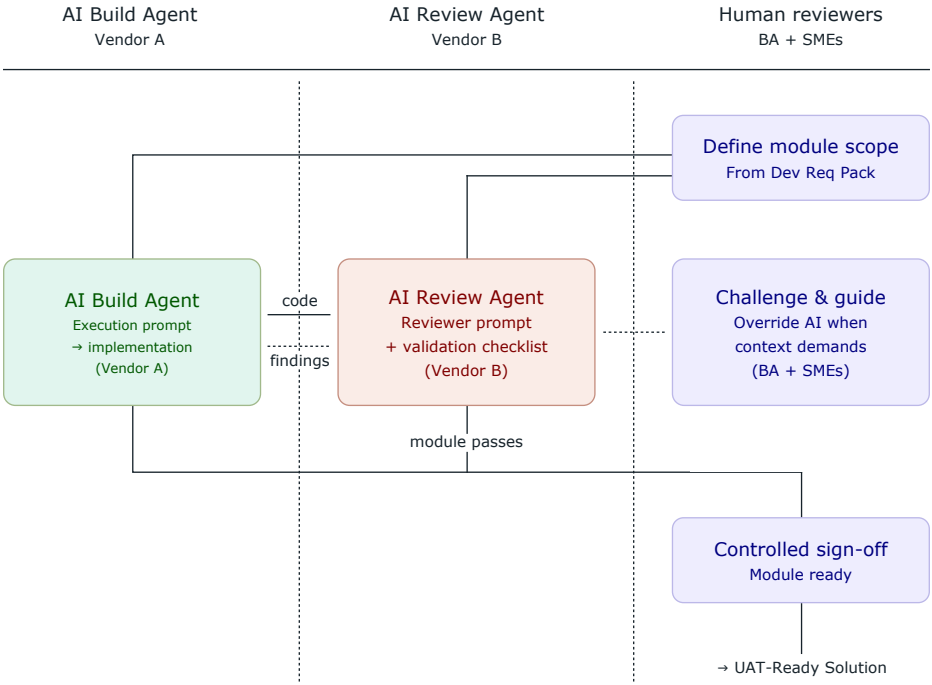
This became an AI-assisted solution delivery framework: a structured approach that transforms business requirements into controlled, modular, AI-ready implementation units. It combines business analysis, solution architecture, delivery governance, AI coding instructions, validation checklists, security review, User Acceptance Testing (UAT) feedback loops and production-readiness controls to guide delivery from requirements to deployment.


BRD
Business requirements
iterate
Usage Journey
Realistic scenarios
SDD
System architecture & design
+ human SMEs
Master Implementation Control
Governance backbone
AI Build Governance Pack
Rules, constraints, APIs
UI Branding & Style Guide
Visual & accessibility rules
Development Requirement Pack
Per-module scope
Per-module delivery loop - three actors run in parallel
AI Build
Vendor A
Implements
AI Review
Vendor B
Validates
Humans
BA + SMEs
Govern & sign off
Controlled Review & Sign-Off
BA + human SMEs
UAT-Ready Solution
User Acceptance Testing
End users
No issues / changes
Accepted?
Yes
Production-Ready Solution
Production Release

This original diagram shows how the BA-led requirements package connects business requirements, usage journeys, solution design, governance controls, SME validation, AI-assisted implementation, independent review, UAT, and production readiness.

The framework started with the traditional Business Requirements Document (BRD), but added a Product Usage Journey to describe realistic scenarios; a System Architecture / Solution Design Document (SDD) to translate needs into build-oriented design; a Master Implementation Control Document to govern sequencing and sign-off; an AI Build Governance Pack to define workflows, validations, and access rules; and a UI Branding and Style Guide to maintain a consistent user experience.

Each module then had its own Development Requirement Pack, AI Agent Execution Prompt, Review and Validation Checklist, and independent Reviewer, Tester and Security Checker Prompt. In practice, this turned static handover documentation into an operational control system for delivery.



This original diagram shows the module-level AI-assisted delivery loop. Three concurrent lanes illustrate the dual-vendor separation between AI build and AI review, with human oversight. Build and review iterate via 'code → findings' until the module passes; humans set scope at the top and sign off at the bottom.

I used two coding agents from different vendors with separate responsibilities. One focused on implementation; the other supported independent review, testing, security, and privacy validation. This separation mattered because AI-assisted delivery should not rely on one tool to build and approve its own work. During development, the coding agent sometimes suggested useful shortcuts, but some of those suggestions had to be challenged or rejected because the tool did not understand the organisational context, compliance obligations, or the bigger picture.

The result was a working solution serving organisations across more than 60 countries, supporting multiple languages and aligned with cybersecurity and data protection expectations, including mobile applications designed to meet app stores' security, and privacy requirements.

My main lesson is that AI-assisted delivery succeeds when business analysis becomes more structured, not less. A traditional BRD is not enough when AI becomes part of the implementation. Requirements must become controlled, modular, testable, and reviewable delivery assets.

This also changes the BA skill baseline. The BA does not need to become a cybersecurity specialist, data privacy officer, infrastructure architect, AI engineer, or software engineer. However, the BA must understand enough about data privacy, cybersecurity, infrastructure, APIs, identity and access management, audit trails, monitoring, resilience, and AI governance to ask the right questions and manage decisions with SMEs.

The future of business analysis is about better requirements, stronger structure, greater governance, and clearer execution. The opportunity for BAs is to move from writing static requirements to designing the controlled delivery framework that turns business needs into working solutions.

In the AI age, the business analyst is no longer defined only by what they write, but by how effectively they transform requirements into delivery.

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Landing on a Moving Train: The BA's First 100 Hours

Nastassia Shahun



Stepping into an ongoing project can feel less like a professional transition and more like jumping onto a moving train. The momentum is already established, the tracks are laid, and the passengers—your stakeholders—are often too preoccupied with the journey to explain the map. While the temptation for a BA is to immediately dive into the backlog or attend every scheduled meeting to "catch up", the most effective practitioners take a more deliberate, structured approach.

The goal of the first few days is not immediate output, but rapid orientation. Great BAs recognise that their value in the early stages lies in their ability to validate the current trajectory before they attempt to influence it. By following a structured onboarding flow, a BA can move from confusion to informed contribution within the first week.

Context Before Content

The first instinct of many BAs is to look at the "what": the requirements, the user stories, and the technical specifications. However, without the "why", these artefacts are just fragments. Great BAs begin by anchoring themselves in the business context. Before touching a single ticket in Jira or DevOps, it is essential to understand the organisational problem the project aims to solve.

This begins with a deep dive into existing documentation with a specific lens: the "current state" versus the "future state". If the project is mid-flight, there is a risk that the original vision has blurred. By reviewing the business case and project charter, the BA can identify the intended value proposition. Mapping this against the current work-in-progress often reveals "drift" indicators—areas where the solution may have veered away from the original business objectives.

Mapping the Human Landscape

A project is more than its documentation; it is a web of human expectations and power dynamics. Identifying key stakeholders is a

priority that happens alongside document review. However, a great BA goes beyond a simple RACI matrix to understand the "decision-making DNA" of the project. Who provides the final sign-off on requirements? Who holds the unofficial veto power?

In the first three to seven days, the BA should prioritise brief, one-on-one "listening tours" with core stakeholders. The objective is to validate assumptions and clarify scope boundaries. Asking a simple question like "What is the one thing this project must achieve for you to consider it a success?" can reveal significant misalignments that a written status report is unlikely to surface.

Assessing Project Health and Artefact Debt

A seasoned BA knows that the state of documentation is often a mirror of the project's health. As you review existing functional specifications, look for "artefact debt". Are the requirements updated to reflect the latest change requests, or are people working from tacit knowledge shared only in informal channels?

Great BAs perform a quick gap analysis on the project's internal knowledge base. If there is a disconnect between what is being built and what is documented, that is a high-priority risk. Identifying these gaps early allows you to warn the project manager of potential rework. This "health check" demonstrates a proactive mindset, showing you are there to safeguard the quality of the delivery rather than just processing tickets.

Navigating the Technical and Data Landscape

Part of the BA role involves acting as a bridge between business and technology, but that bridge only works if you understand the terrain. Great BAs spend part of their first week getting comfortable with the project's "physical" reality by requesting access to prototypes, wireframes, or test environments. Seeing the product in its current state—even if incomplete—often provides more clarity than a hundred pages of requirements.

Furthermore, it is crucial to investigate the data. Understanding how information flows and identifying the "source of truth" for key entities prevents flawed assumptions. By requesting a high-level data dictionary or an architectural overview early on, the BA ensures that their future requirements are grounded in technical feasibility.

Establishing the "Ground Rules"

Once the context and the people are clear, the focus shifts to the process. Every project has an internal rhythm regarding how decisions are made and how information flows. A BA entering an ongoing stream within an agile context must quickly identify the Definition of Ready (DoR) and the Definition of Done (DoD) as they are actually practised, not just as they are documented.

If the project lacks a clear mechanism for handling scope creep or conflicting requirements, the BA identifies this as an early risk. Instead of forcing

immediate change, they observe the current friction points. This period of observation allows the BA to align their working style with the team's cadence, ensuring their future input is seamless rather than disruptive.

Defining the Communication Cadence

A common pitfall for a new BA is "communication overwhelm": either sending too many emails or disappearing into a vacuum. Great BAs take control of their integration by defining how they will communicate. This means clarifying with the project manager or lead BA how they should surface findings or ask questions during the first week.

Establishing a cadence, such as a brief end-of-day summary of progress and blockers, prevents you from becoming a bottleneck. It also reassures the team that while you are still learning, you are organised and focused on becoming a contributing member of the team as quickly as possible.

Seeking the Early Quick Wins

A significant part of a BA's initial success depends on building credibility with a pressured team. During the first week, look for "low-hanging fruit"—small ambiguities that can be resolved quickly. This might involve cleaning up confusing user stories, documenting a process that has never been documented before, or tightly facilitating a meeting that has previously lacked a clear agenda.

By fixing these minor pain points, the BA demonstrates immediate value. This builds the political capital to tackle larger, more systemic project issues later. It signals to the team that the new BA is a resource who can actively reduce the team's cognitive load and streamline the path to delivery.

The First-week Checklist

To ensure productivity, the BA's first week should follow a logical progression. Days one and two are dedicated to **immersion**: reading archives and shadowing a developer to see the product in action. Days three and four are for **validation**: meeting stakeholders to confirm that documented requirements match current business reality. By day five, the BA moves toward **contribution**: spotting gaps in the logic and offering a fresh perspective on the backlog.

By the end of the first week, a successful BA doesn't just know where files are stored; they understand the project's pulse. They have identified the high-level goals, noted the risks, and established the trust necessary to begin driving the project toward its destination.

Nastassia Shahun is a Senior Business Analyst with expertise in business analysis, product management, and UX/UI. She drives user-centric innovation across FinTech, EdTech, and eCommerce. A dedicated mentor, speaker and writer, she shares insights on medium.com/@nastassia.shahun_72023 and connects on www.linkedin.com/in/nastassia-shahun/

The POETICS of Transformation: A Holistic and Open Source Lens for Change Management

Adrian Reed

I was recently thinking about the impact a potential change would have, and my mind wandered to the various mnemonics and frameworks that can be used for this. My mind went to frameworks such as POPIT™, POTI, McKinsey's 7S, and the like.

I was specifically thinking about the *ethical* impact of change, and was surprised that ethics isn't directly covered by any of the commonly-used frameworks. It might be *indirectly* covered by some, but to me this felt like a missing piece of the puzzle, and one that is arguably relevant now more than ever. Always being someone who is somewhat 'action oriented', I decided to have a go at putting together an alternative framework that plugs this gap.

After some head-scratching, and thinking about making something short enough to be memorable while also broad enough to be useful, I came up with a group of terms. These terms are like "lenses" to look at a situation. I'm not suggesting for one moment that this is exhaustive, nor will it fit all circumstances. However I found it useful so thought I'd share it in case you do too!

The POETICS Framework

By happy coincidence, the series of terms I landed on happened to spell POETICS. Or rather, they did after a bit of jiggling (let's be honest, we all know these things are really "backronyms", right? LOL)

The first draft of the framework is shown below. I've also included some potential focus areas, and key reflective questions. However, it isn't designed to be rigid… if you feel something should be added or changed for your context, you are probably right! It isn't designed to be interpreted too literally or narrowly either. Like so many of these frameworks, it's intended to act as a 'thinking tool'. But it isn't intended to replace the actual thinking…

Lens	Focus Areas Include	Key Questions for Reflection
People	Individuals and Teams. Internal and External. Customers, Suppliers and Staff.	Who is affected? Do they have the skills and support needed for the shift? What are their hopes and fears? What does success look like from their perspectives?
Operations	Processes and Workflows.	How do our daily activities change? What processes become redundant, change or need creation?
Ethics	Ethical, Ecological and Social Impact.	Is this change fair? Does it align with our values? What might the unintended consequences be? Which voices have been missed, and how can they be represented? Are there any gaps which mean that unethical consequences might occur?
Technology	Tools, Infrastructure and Integration.	What digital or physical tools are required? How does the tech stack evolve?
Information	Data, Information and Knowledge. Information and Cyber Security.	What data is needed to make this work? How consistent and structured is that data? How do people make sense of the data? How is knowledge captured and shared? How is the information used to drive decision-making, and is anything missing? What are the information and cyber security considerations?
Culture	Values and Mindsets.	Does this fit "how we do things here"? Does it challenge or reinforce our shared values?
Structure	Governance and Hierarchy.	How are reporting lines affected? Who holds the decision-making authority now?

With the help of AI, POETICS can also be illustrated graphically. Building on the metaphor of using 'lenses', I've used the metaphor of a camera aperture:



Building on the Giants

The POETICS framework doesn't exist in a vacuum. It is designed to build upon and supplement the excellent models and concepts that already exist in the BA arena. Specifically, it draws inspiration from frameworks such as:

- **POPIT™:** A holistic model covering People, Organisation, Processes, and IT (a trademark of Assist Knowledge Development Ltd)
- **POTI:** A framework from Managing Successful Programmes (MSP®), focusing on Processes, Organisation, Technology, and Information.
- **McKinsey 7S:** The classic model examining Strategy, Style, Skills, Systems, Structure, Staff & Shared Values

A relevant question at this point is *why another model? Don't we have enough!* While we do have a range of well-established industry frameworks, POETICS is intended to plug two key gaps. Firstly, it explicitly highlights ethics and culture, elements that are often implied in other models but rarely given their own dedicated seat at the table. Secondly, it is totally open source, so it can be used/copied/adapted as needed.

Using POETICS

Here are three ways the POETICS framework could be used:

- **Impact Assessment:** The "lenses" can be used to consider impacts (both positive and negative) that would occur if a proposed change is implemented. It can also be used to compare competing change ideas.
- **Gap Analysis:** The framework can be used to compare an existing situation against a future (desired) state, to determine key gaps.
- **Ethical Guardrails:** The "ethics" lens can act as a useful checkpoint to ensure that "can we do this" never overrides "should we do this."

I'll be continuing to experiment with the framework. If you find it useful, feel free to do so too. It's very much intended as a flexible framework that can be copied, shared, adapted and remixed… so please feel free to customise it! And please do share any adaptations that you make. It is always interesting to see tools get adapted.

Adrian Reed helps organisations make sense of nonsense, one box and arrow at a time. He edits BA Digest and is Principal Consultant at Blackmetric. Curiosity fuels his thinking. Industrial amounts of caffeinated cola fuel the rest. Connect before the caffeine wears off: linkedin.com/in/adrianreed

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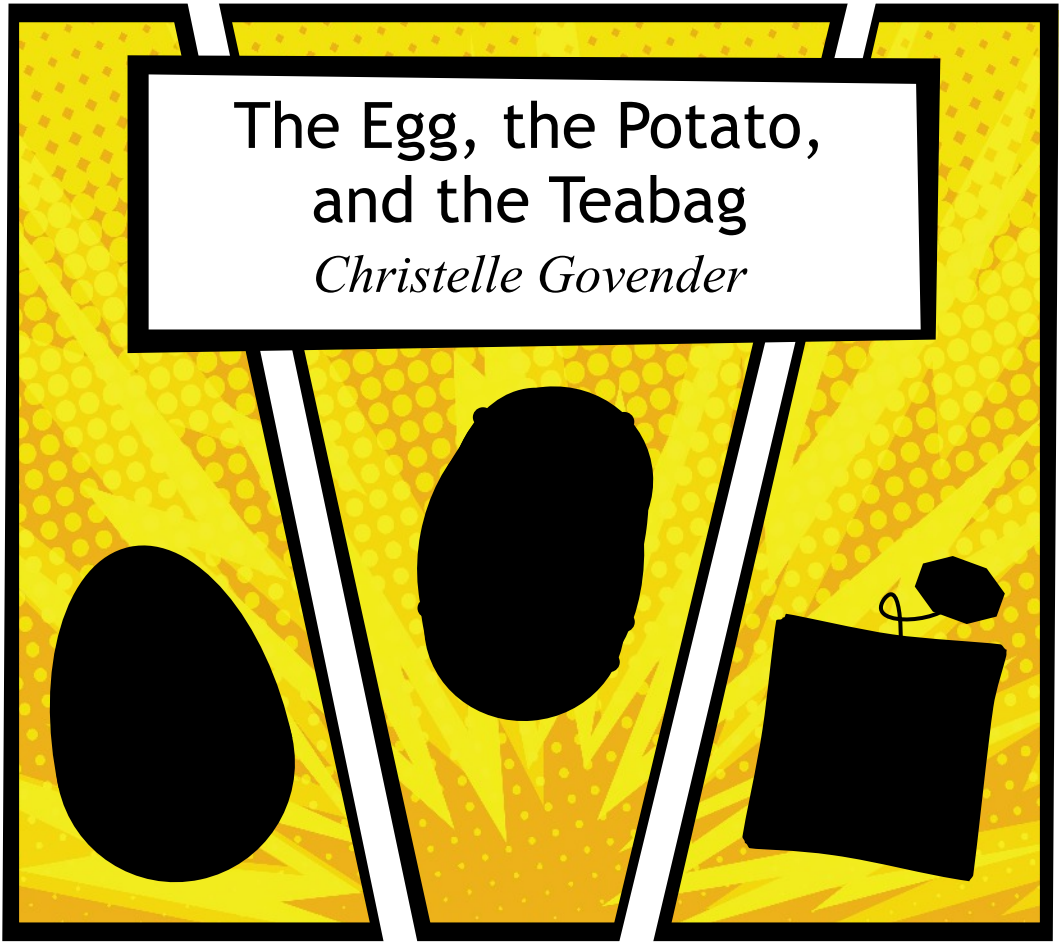
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What if the very things we fear most at work, crises and conflict, could become our greatest sources of strength?

As business analysts, we are wired to seek clarity. We analyse, document, model, and facilitate in pursuit of shared understanding and predictable outcomes. Yet the reality of our work is often much less stable… Projects catch fire, stakeholders clash, timelines compress and systems fail. Pressure is not the exception in our role; it is the norm.

To talk meaningfully about resilience, we need to move beyond theory and look honestly at how we respond when things heat up.

The Egg, the Potato, and the Teabag

Imagine three things placed into the same pot of boiling water, an egg, a potato, and a teabag.

The boiling water represents crisis, conflict, ambiguity, tight deadlines, and high stakes delivery. The heat is

the same for all three. What changes is the outcome.

The egg goes in soft and comes out hard. The potato goes in firm and comes out soft. The teabag goes in and changes the water itself. When pressure rises, who do we become?

This metaphor matters because crisis does not create character, it reveals it. The same pressure that hardens one person can overwhelm another, while enabling someone else to transform the environment around them.

What Resilience Really Means

Resilience is often misunderstood as toughness or endurance. According to PositivePsychology.com, resilience is "the process of adapting well in the face of adversity, trauma, tragedy, or significant stress."

In other words, resilience is not about being unshakable, it's about being bendable without breaking. More importantly, it is about learning, adapting, and moving forward in motion. Resilience is not a trait you either have or do not have; it is a skill you build.

In a business analysis context, resilience shows up in how we respond when requirements change mid-sprint, when workshops become heated, or when delivery feels uncertain.

Fire Is Not the Enemy

A crisis does not need to be dramatic to be destabilising. It can be any unexpected event that threatens plans, confidence, or control. Anything from a system outage to a regulatory change could ignite the "crisis mode" and feel like an obstacle.

Ryan Holiday illustrates this powerfully in his book *The Obstacle Is the Way*, where he tells the story of a king who placed a massive boulder in the middle of a road to test his people. Many complained or walked away. One man stopped, pushed the boulder aside, and found a pouch of gold beneath it, along with a note from the king that read, "The obstacle in the path becomes the path. Never forget, within every obstacle is an opportunity to improve our condition."

For BAs, this lesson is deeply familiar. The obstacle is not a detour from our work; it is the work. When systems fail or plans unravel, we are often the first responders, translating chaos into clarity. Fire is not where our role ends. It is where it becomes most valuable.

Friction Is Where Growth Happens

If fire represents crisis, friction represents conflict. And conflict is inevitable when people care about outcomes, and it comes in many forms. The goal is not to eliminate conflict. Some would argue that the opposite of conflict is not harmony, it is apathy—and no resilient team grows from apathy. Our role as business analysts is to facilitate conflict productively. This involves activities including:

- Turning debate into discovery
- Separating people from problems

- Refocusing tension back onto shared value

When facilitated well, friction becomes fuel rather than friction that burns.

The Resilient BA Manifesto

In other words, resilience is not something we either possess or lack. It is something we practise. When translated into a business analysis context, resilience becomes behavioural rather than abstract.

Over time, this thinking evolved into what I now call the Resilient BA Manifesto. It is intentionally inspired by the spirit of the Agile Manifesto, not as a framework to enforce, but as a set of values to return to when certainty disappears.

A resilient BA:

- Embraces *ambiguity* instead of resenting it.
- Balances *empathy* and *objectivity*.
- Recovers fast when things go wrong.
- Keeps purpose in focus when everything else is blurry.

At its core, the Resilient BA Manifesto embraces ambiguity instead of resenting it, recognising that clarity is created through engagement rather than waiting for perfect information. It balances empathy and objectivity, understanding that strong analysis sits at the intersection of human experience and structured thinking. It prioritises recovering quickly when things go wrong, choosing learning and forward momentum over blame. And it keeps purpose in focus when everything else feels blurry, anchoring decisions in value rather than noise.

Like agile itself, this manifesto is not static. It is adaptive, context driven, and continuously evolving. It is tested most deeply not during calm delivery phases, but in moments of fire and friction.

Choosing the Teabag Response

Resilient BAs demonstrate competence by applying skills under pressure, not rigidly but flexibly. They demonstrate confidence by trusting their judgment even when information is incomplete. As the reminder goes, "Confidence is competence remembered. You've solved hard problems before, you can again."

They build connection by investing in relationships before crisis hits, knowing that influence comes from trust rather than authority. They act with character, balancing system outcomes with human impact. They stay anchored in contribution, reframing "What's wrong?" into "What value can we still create?"

They cope by managing energy rather than simply enduring stress, protecting their ability to think clearly. And they focus on control, directing effort toward what they can act on, influence, or consciously release.

Crisis tests competence and coping. Conflict tests character and connection. Both refine confidence,

control, and contribution. This is how we choose the teabag response.

From Chaos to Clarity

When pressure rises, a simple technique helps. First, recognise what is happening. Is this a true crisis or just complexity? Next, regulate before reacting, because emotional regulation is a technical skill in leadership. Then reframe the story you are telling yourself. "We're failing" becomes "We're adapting." Finally, respond with one next right action. Clarity beats speed in chaos.

Resilience is not built in comfort. It is built in the fire and refined in connection.

So, the next time a project ignites, a meeting escalates, or uncertainty threatens to overwhelm, remember the pot of boiling water. You cannot control the heat. But you can choose who you become in it.

— A work in progress resilient BA

Christelle is a Business Analyst currently working in customer loyalty for retail. An IIBA-SA volunteer and former Brand Executive Director, she is passionate about mentoring BAs and empowering women in tech. Known for making complex processes relatable, Christelle delivers practical, people-focused solutions that help teams and businesses thrive.



BA Back Stories

Roger Burlton





Interviewed by Christina Lovelock

Roger is based in Vancouver, Canada and is the president of Process Renewal Consulting Group Inc. He is also co-founder of BPTrends Associates; the services firm of the world-leading BPTrends.info knowledge portal. He is the author of multiple books and contributes to many community events including the Building Business Capability Conference in North America and the IRM UK Business Change and Transformation Conference in Europe.

What else is going on this week? What would you be doing if we weren't having this conversation?

I am developing something new, with Whynde Kuehn, who is also well known in the business architecture space. We're developing the idea for a new approach to maturity. We're looking at the idea that things don't work independently, things work dependently, and we apply the term *cohesion*. If we look at all the members of a group which are dependent, if any one of them doesn't work, then the whole thing doesn't work.

And this idea is more and more important today. We're seeing that everything has to work and not one aspect of it can be left behind. So, we're putting together something on that, we're working on figuring out how to talk about it, and how it can be useful for people. We've written a white paper on this topic.



What's something that people still get wrong about business architecture that you notice?

People take a specific perspective, when they need to see everything is dependent. They may take a domain perspective, or a capability perspective, (which is the worst! You can't just build capabilities, you can't operate a capability unless it all works with other capabilities!). Or they might take a data perspective, or a process perspective.

They try to look at one thin piece, one thin slice of the puzzle, and they don't see that everything is dependent upon one another. We have to remember that your data is created by your processes, and your processes can't do anything if your capabilities aren't there and your people don't have the right attitudes and behaviours.

They take a single slice. They don't look at how all the pieces fit. And more and more, we're seeing that you have to get all of it right. You've got to take a wider view, a higher view of the problem. How does it fit strategically? What difference does it make? Does it lead to better performance and connect things? It's all about connecting the dots. That, I believe, will never change. Now, the things we're connecting might change, but the fact that you've got to connect them won't!

What led you to business analysis and business architecture?

Well, I graduated as an industrial engineer, so it's always been in my blood. I can't go anywhere without seeing something wrong with what they're doing. You know the problem! So, I think, 'That's interesting. Why did they do that? Why did they do it this way? Why didn't they do it that way?' And that analytical thinking has always been there. I remember my first job, I worked in the Canadian federal government, and I was an organisation and methods analyst. So analysis is something I've always done in one form or another. It's just changed its nature a little bit with new technologies.

But I've always seen the whole pie. I've never just seen a slice of the pie!

I remember there was a professor in university, on a course called Management Science. He said to us: 'If we want to solve water pollution in waterways, what we should do is make the cities upstream put their water effluent upstream from the water intake, which is downstream. So all of a sudden, you wouldn't have pollution in rivers!'. And so just that simple little thing, it always stuck in my mind: you've got to get to what's the motivation behind the behaviours? Can we change the motivation? What can we do differently? How can we look at the problem from more than one slice or more than one angle?

How have you noticed business analysis and business architecture roles changing since you started?

Before, business analysts were given a problem, you fix this, or you solve that, or it's one perspective on that problem, one aspect of that problem. Whereas I think that in general, BAs get much more involved in the bigger





picture than in the past. BAs aren't just writing requirements for systems, because that doesn't solve the whole business problem. I think we've gotten more influence. I think we can make a bigger difference now.

This is true of business architects and business analysts, that we are looking at enterprise performance. Not just 'can I measure this system? Is it working better?' But 'Am I delivering better outcomes? And are those outcomes measurable? What are the results of what we're doing in terms of the overall behaviour of our organisations?' I think we're much more, maybe this is hopefulness, but I think we're more influential than we were before. And the smart organisations, at least, are listening to us.

Is there anything that you wish you'd learned earlier in your career?

Yes—the idea of don't sit in your little silo, look outside your silo, be curious, and challenge. It's helpful to think 'I'm probably not going to get fired by challenging, even though the people I'm talking to are three levels up the org chart'. I think that's something we should do more of—questioning, challenging, looking for alternative ways of doing things.

Also, I believed that the people in control, the people in power, knew what they were doing! But I wished I had learned that they don't know what they're doing. Even the people doing the strategic direction of the organisation, they don't know what they're doing. They've not been trained in broader thinking. So, do your own research, do your own questioning, bring things to the table without embarrassing the people you're talking to. Don't just accept what you're told.

I know that both collaboration and community are important to you. Why do you think they're valuable for business analysts?

Being a business analyst can be a lonely job. Even though we're talking to a lot of people, I think that we've got to support each other and we've got to learn techniques and have the confidence to be able to go in and do these more impactful things. It can be a daunting role, I think that it's a difficult job and we need support from one another. We also need to learn. Things rapidly change. We need to be part of the community. It's one of the reasons I like the conferences so much, especially the conversations that happen outside the presentations, not just the stuff that's inside the presentations. Reading, staying up to date and being part of that community is really key.

Somebody who was really the biggest mentor in my career said something to me years ago. He said, 'Roger, I spent half of my career learning how to do this. And I spent the other half of my career after that learning how to talk about it.'

Being able to communicate is a really important aspect of all of this stuff. So being part of a community also means giving back to the community and helping everybody through it, which I think is really important.

Have there been any key decisions or turning points in your career?



I think that probably the biggest thing for me was when I left the Canadian federal government. I left after a few years and was hired by a consulting firm. Six months after I was hired, I was given the job of branch manager. I had 85 consultants and I was 29 years old. I did it for six months and then I left. And the reason I left was all I was dealing with was administrative, like managing the sales team and looking after consultants every day. *I found myself getting away from what I was good at*. I'm glad I did the job, but I'm also glad that I left that job. From there I went back and I became a consultant. I wanted to learn and keep progressing forward and not be bored.

I think that that's probably the biggest thing for me. I would not be where I am in my career today if I had just stayed and done that job.

Are there any small habits that you feel make a big difference to your work?

Well, I wish there were some small habits that I had adopted, which are things I'm not very good at! I do get distracted a little bit, because there's a million different things that you could be doing these days.

One thing that I've really done is I've never taken my eye off of where I want to go. I've never taken my mind off of what makes a difference. That goes right back to my industrial engineering days. I always wanted to help people do their work better, and I've never lost that. Always keeping an eye on what success looks like.

And secondly, making sure that all the bits and pieces of work hang together. I've always had that perspective. There are things that come along. I mean, the internet came along, digital came along, AI is now coming along. And these are all things which can knock you off your path, but we need to make sure things actually work together. I've never lost that. Some people might call it being stubborn. I call it being focused!

Do you have a skill or trait that has particularly helped you in your career?

I would say it's keeping focused but it's that combined with never being satisfied.

There's always something more out there. There's always a better way. And I've always looked for it. I could have been irrelevant years ago, but I've always kept fresh. On the one hand that is nice, on the other hand it's dissatisfying in that we haven't found all the answers yet!

So, it's that constant search, and never believing you've got the answer, never believing there *is* an ideal answer. I get people, especially in the business architecture space, who say 'well, where should I start?' and I say, 'well, it depends. You start from where you are!' No two organisations are in the same place. It always depends. You've got to be flexible. But part of being flexible is always keeping your eye on the outcome.

Not being caught up with methodology or technique but always keeping your aim towards what you can possibly do, and then let the rest happen over time. It will get better.



We'll keep getting better. As long as we have that attitude, we keep getting better. I think it's more of a mindset than a skill.

What's a topic that you wish more business and change professionals were talking about?

Common sense. Just because something is topical, interesting, if it doesn't feel right, then it probably isn't right. I've always trusted my gut.

This is your chance to give a shout out to something. Anything you want to share with other people that you think might help or inspire them.

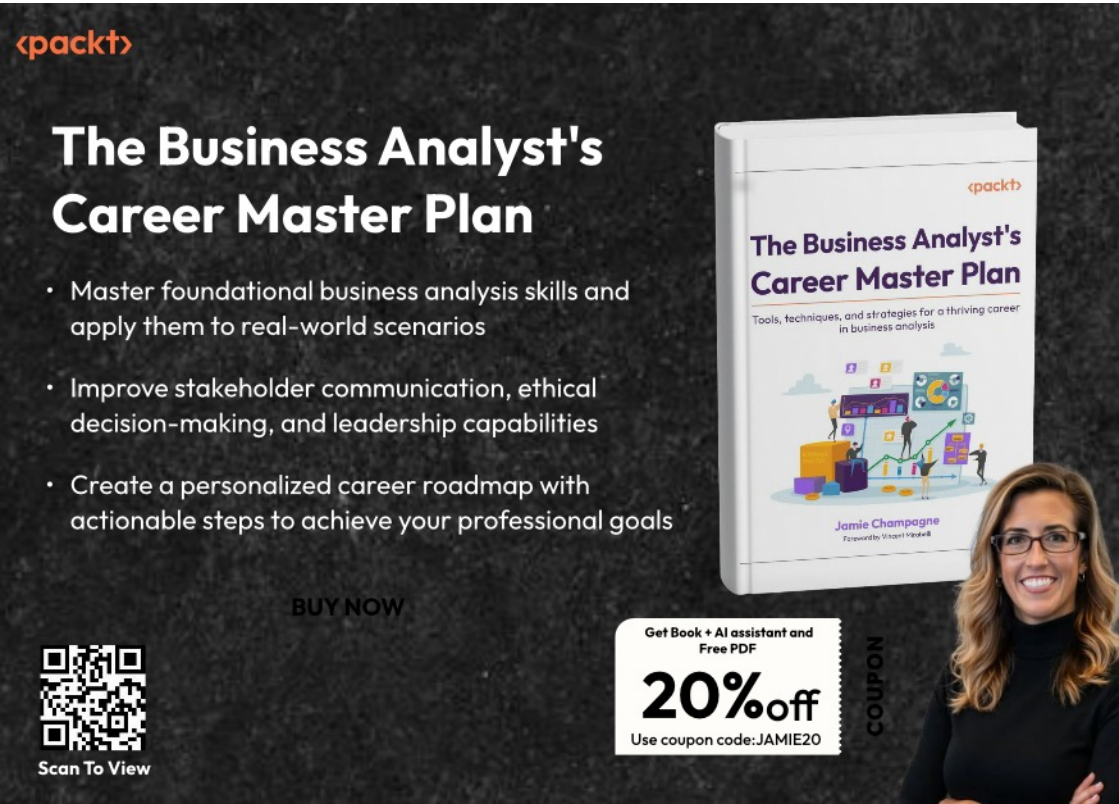
I want to let people know about my book, if they want to know more: Business Architecture, Collecting, Connecting, and Correcting the Dots.

Also, what we've got coming up with regard to the idea of *cohesion*, I think that's going to be exciting, so check it out!

Connect with Roger via LinkedIn

About the interviewer:

Christina Lovelock is a digital leader, author and coach. She is active in the Business Analysis professional community and champions entry-level roles. She is the author of two BCS books: Delivering Business Analysis and Careers in Tech, Data and Digital. Connect with Christina on LinkedIn



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