



Implementing AI in business analysis

Using AI to strengthen business analysis while keeping evidence, stakeholder context, and decision ownership visible.

WORKS WITH THE ASSISTANTS TEAMS ALREADY USE



EDITION 35 / EMBER & LILAC

EXECUTIVE WORKING EDITION - 08 OCT 2026

35

AT A GLANCE

Using AI to strengthen business analysis while keeping evidence, stakeholder context, and decision ownership visible.

Business analysts spend much of their time turning conversations, documents and data into clear requirements, process maps and recommendations. AI can speed the drafting, structuring and synthesis that surround that work, and it can prompt the questions an analyst might miss. It cannot attend the workshop, sense the politics or own the recommendation. This playbook shows how to use AI across requirements, process mapping, stakeholder synthesis, data questions, options analysis and documentation, with templates, checks and ways to measure the result.

WHO IT IS FOR Business analysts, product owners, project and change leads, and managers who commission analysis and need it to be reliable.

TIME TO USE 60 minutes to read; one team session to apply

What you will have at the end

- A work map of analysis tasks showing good fits for AI and the human checkpoint for each
- Request templates for requirements, process mapping, stakeholder synthesis, data questions and options analysis
- Rules for handling interview notes, personal data and sensitive business information
- A verification routine and a baseline for measuring time saved and quality

Contents

01	AI as a drafting and challenge partner for analysts	03
02	Where AI fits across the analysis cycle	04
03	Information rules, approved tools and sensitive material	05
04	Requirements capture and process mapping	07
05	Stakeholder synthesis, data questions and options analysis	09
06	Verification and review habits	11
07	Measuring time saved and quality	13
08	Team routines and sharing what works	14
09	Pitfalls and a worked scenario	15
10	A first quarter that produces evidence	16
11	Terms used in this publication	17

EXECUTIVE BRIEF

AI as a drafting and challenge partner for analysts

01



Good analysis is evidence plus context plus judgment. AI helps with the first and supports the second. The third stays with the analyst.

Analysis work has a recognizable shape. You gather input from interviews, documents, systems and data. You organize it into requirements, models and findings. You test it with stakeholders, then recommend. Along the way you write a great deal: notes, user stories, process descriptions, summaries, decision papers. Most of that writing is structured, repetitive and checkable, which is where AI saves time.



The risk is subtle. A language model will produce a tidy requirement list or a neat summary of a workshop even when the input was thin, and tidy output hides gaps. It also tends to smooth over disagreement, which is often the most important thing in the room. An analyst who uses AI well keeps the evidence visible, keeps dissent visible and keeps ownership of the recommendation.

- Use AI to structure raw notes into draft requirements, then check against what was said.
- Use AI to draft process descriptions and spot gaps in the logic.
- Use AI to cluster stakeholder input by theme, and to surface what is contested.
- Use AI to suggest questions to ask of the data, then run the analysis in your own tools.
- Do not use AI to decide priorities, assign value or make the recommendation.

**KEEP THE TRAIL**

Every finding in your final document should point to evidence: an interview, a document, a data extract. If AI wrote the sentence and you cannot point to the evidence, the sentence is not ready.



WORKING QUESTION

Which part of your last analysis document was mostly reformatting what you already knew?

THE WORK MAP

Where AI fits across the analysis cycle

02

Separate the tasks that reshape text from the tasks that depend on people and context.

List the activities in a typical engagement, from scoping to handover, and sort them. Tasks that transform existing material, such as summarizing, restructuring or drafting, are strong fits. Tasks that create new evidence, such as running a workshop or observing work, need a person. Tasks that decide, such as choosing between options, belong to the accountable stakeholders with the analyst advising.

ANALYSIS TASK	GOOD FIT FOR AI	HUMAN CHECKPOINT
Requirements elicitation and prep	Draft interview guides and question lists from the brief	Analyst tailors to the person and context
Requirements documentation	Turn notes into draft stories, acceptance criteria, edge-case prompts	Analyst and stakeholder confirm wording and priority
Process mapping	Draft step lists and flag missing branches and handoffs	Analyst validates with people who do the work
Stakeholder synthesis	Cluster themes, list agreements and disagreements with sources	Analyst reads the originals and weighs influence
Data questions	Suggest hypotheses, metrics and checks to run	Analyst runs analysis and verifies results
Options analysis	Draft options, criteria and trade-off tables	Decision owner sets criteria weights and chooses

ANALYSIS TASK	GOOD FIT FOR AI	HUMAN CHECKPOINT
Reporting and documentation	Draft summaries, release notes status updates	Analyst checks facts and tone before issue

A USEFUL TEST

Ask whether the output could be checked by someone who was not in the room. If yes, AI can draft it. If it depends on what was sensed in the room, the analyst must supply that.

WORKING QUESTION

Which task on your list creates new evidence, and which merely reshapes evidence you already hold?

SETTING UP SAFELY

Information rules, approved tools and sensitive material

03

Analysis material often includes names, opinions and internal data. Set rules before pasting any of it.

Interview notes contain candid views about colleagues and managers. Process documents describe controls. Data extracts can include customer or employee records. Each has different handling needs, and in many places data protection rules apply to personal data. Check current requirements that apply to you with your privacy or compliance function, and use only tools your organization has approved for the class of data involved.

MATERIAL	RISK	HANDLING RULE
Public documents and published research	Low	Any approved tool

MATERIAL	RISK	HANDLING RULE
Internal process documents and templates	Medium	Approved company tools only
Interview and workshop notes	High: opinions and names	Remove names or use initials; approved tools only
Data extracts with personal information	High	Do not paste; use aggregated or synthetic examples, or an approved secure environment
Board papers, strategy, unreleased plans	High	Only with explicit permission from the owner

Before using a tool on analysis material

- The tool is on the approved list for this class of material.
- Names, personal data and commercial identifiers are removed or replaced with labels.
- You know whether inputs are retained or used for training.
- Participants in interviews were not promised confidentiality that this use would break.
- You know where the output will be stored and who can read it.

One practice helps a great deal: keep two files. One holds the raw notes with names, kept in the approved system. The other holds the anonymized version used for AI help. Mapping between the two stays with the analyst.

WORKING QUESTION

If a stakeholder learned that their interview notes had been pasted into a public tool, what would you have to tell them?

TASK PLAYBOOKS: REQUIREMENTS AND PROCESS

Requirements capture and process mapping

04



Use AI to turn rough input into structured drafts quickly, and then spend your saved time on validation with people.

Playbook 1: Requirements from notes

01 Anonymize and label

Replace names with roles. Add the source and date to each block of notes so statements stay traceable.



02 Draft

Ask for requirements as user stories or numbered statements, each with its source reference and a confidence note.

03 Probe for gaps

In a separate request, ask for edge cases, exceptions, non-functional needs and conflicting statements.

04 Validate with stakeholders

Read the draft against your notes, then walk it through with the people who said it. Confirm wording and priority.



REQUEST TEMPLATE: REQUIREMENTS DRAFT

Below are anonymized interview notes. Write draft requirements as numbered statements in the form: The [role] needs to [capability] so that [outcome]. After each, give the source note ID. Do not add needs not supported by the notes. Then list contradictions between sources and questions that remain open. Notes: [paste]



Playbook 2: Process mapping

01 Describe the process in plain words

Write or record how the work is done today, including workarounds, as told by those who do it.

02 Draft the steps

Ask for a step list with actor, input, output, system used and decision points.

03 Look for gaps

Ask what exceptions, rework loops, approvals or handoffs seem missing, as questions rather than assertions.

04 Walk it with the doers

Take the draft to the people who run the process. Correct it on the spot. Only then draw the formal diagram.

REQUEST TEMPLATE: PROCESS DRAFT

From the description below, produce a numbered step list. For each step give: actor, action, input, output, system or tool, and any decision with its outcomes. Mark steps you inferred with the word inferred. Then list five questions about exceptions, delays or handoffs that the description does not answer. Description: [paste]

The real process is often not the documented one. AI drafts from what you give it, so if you feed it a policy manual you will get the policy, not the practice. Observation and conversation come first.

WORKING QUESTION

Where does the actual work in your current project differ from the documented process, and how would you find out?

TASK PLAYBOOKS: STAKEHOLDERS, DATA AND OPTIONS

Stakeholder synthesis, data questions and options analysis

05



These tasks tempt analysts to accept the first neat answer. Use AI to widen the view, then test it.

Playbook 3: Stakeholder synthesis

01 Prepare comparable input

Use the same questions for each stakeholder, with notes anonymized and tagged by role and date.



02 Ask for themes with evidence

Request themes, each with supporting quotes and the number of sources, and a separate list of disagreements.

03 Check for flattening

Ask what views appear only once or come from a single senior voice, because summaries lose minorities.

04 Add context only you hold

Weigh influence, history and politics yourself. The tool does not know them.



REQUEST TEMPLATE: THEMES

Here are anonymized notes from eight stakeholders, tagged by role. Identify the main themes. For each give the roles that raised it and one short supporting quote. List separately where stakeholders disagree and what each side says. Flag any view held by only one person. Do not resolve disagreements.

Playbook 4: Data questions



Ask AI to propose what to look at, not what the data says. For example, give it a description of the process and the problem and ask for ten hypotheses, the metric that would test each and the data likely needed. Then run the analysis in your own tools on data you control. If you use AI to write queries or formulas, test them on a small known sample. Never paste personal

records; describe the fields instead.

REQUEST TEMPLATE: DATA HYPOTHESES

Our order-to-delivery process has late deliveries. Fields available: order date, promised date, ship date, carrier, region, product family, order size. Suggest ten hypotheses for the cause of lateness, the comparison or metric that would test each and what could confound it. Do not state conclusions.

Playbook 5: Options analysis

01 Define the decision

State the decision, constraints and who owns it.

02 Generate options

Ask for a range, including do nothing and a low-cost variant, with assumptions.

03 Agree criteria with the owner

The decision owner picks and weights criteria. Do not let the tool choose them.

04 Fill the table with evidence

Score only where you have evidence, and mark the rest as unknown. Present the result as advice.

WORKING QUESTION

In your last options paper, who chose the criteria, and was that written down?



VERIFICATION

Verification and review habits

06



Check traceability, check for flattening, and check the numbers. Those three catch most defects.

Analysis outputs are persuasive documents. A wrong or unsupported statement may drive a project decision, so review has to look beyond spelling and tone. Build a short routine that you apply to any AI-assisted artifact before it leaves your hands, and ask your reviewer to use the same one.

Analyst checks before sharing

- Each requirement or finding links to a source you can open.
- Quotes are real and in context; none are invented or paraphrased as quotes.
- Disagreements and minority views are still visible.
- Numbers, dates and counts match the underlying data.
- Inferred items are labelled as inferred.
- Personal or confidential details are not present in the output.
- Priorities and recommendations are yours or the owner's, not the tool's.



Failure modes to watch

- Invented requirements that fit the pattern but were never said.
- Smoothing: a contested point reported as consensus.
- False precision, such as percentages derived from three interviews.
- Process steps that look correct but describe the policy rather than the practice.
- Confident causal claims from correlational data.
- Summaries that omit the one awkward input that mattered.



REVERSE CHECK

Pick three statements at random from the AI-assisted draft and trace each back to its source. If any fails, re-check the whole piece.

Playbook 6: Documentation and reporting

Status reports, decision papers, release notes and handover documents are largely assembly work. Give the tool the verified facts: what was decided, by whom, what changed, what is open and the evidence for each. Ask it to write to a stated reader and length. Then check every statement against your records and remove anything that sounds more certain than your evidence allows. Keep the decision log yourself, because it is the record people will rely on later.

REQUEST TEMPLATE: DECISION PAPER

Write a one-page decision paper for a steering group. Use only the facts below. Sections: the decision needed, background in four sentences, options with pros and cons drawn from the facts, what evidence supports each, risks and open questions, and the recommendation as stated by the analyst. Mark any gap in evidence. Facts: [paste]

Notice that the recommendation is supplied by the analyst, not generated. The tool shapes the paper, and the person who understands the context owns the advice. That division keeps the work honest and keeps accountability where the organization expects it.

- Ask for the reader's likely objections, and answer them in the paper.
- Ask for a plain-language version for non-specialists and check it for lost nuance.
- Keep a short list of terms and definitions the tool must use consistently.
- Re-read the final version against your sources before it is issued.

WORKING QUESTION

Could a reviewer, with only your document and your sources, confirm any claim in under two minutes?

MEASURING

Measuring time saved and quality

07



Measure the whole cycle, including validation with stakeholders, and measure whether the analysis was right.

Pick a few recurring deliverables, such as a requirements pack, a process description or a stakeholder summary. Time the last few as produced today. Then time the AI-assisted versions, including checks. In analysis, quality shows up late, as rework, change requests and decisions that unravel, so track those too.



METRIC	HOW TO CAPTURE	WHY IT MATTERS
Hours per deliverable	Analyst time log, including review	Real net saving
Rework after stakeholder review	Count changes requested to the first draft	Draft quality
Requirements changed after sign-off	Change log per project	Completeness of discovery
Traceability rate	Share of items with a valid source link	Evidence discipline
Reviewer confidence	Short rating from reviewers	Trust in AI-assisted work
Decision reversal	Decisions revisited because analysis was flawed	Ultimate quality signal



ILLUSTRATIVE EXAMPLE

If a requirements pack drops from 12 hours to 7 hours but post-sign-off changes double, the saving is false. These numbers are illustrative; use your own data.



Keep the sample small and honest. Five or six deliverables measured carefully teach more than a large survey of impressions.

WORKING QUESTION

Which late-appearing signal, such as post-sign-off changes, will you watch alongside speed?

TEAM ROUTINES

Team routines and sharing what works

08

A small shared library and a regular review stop each analyst from rediscovering the same lessons.

Analysis teams share templates for documents but rarely for how they use AI. Close that gap with a simple library. For each task, store the request template, the input preparation steps, the checklist and one anonymized example. Add the failure you saw last time so newcomers start with the warning.

01 Create the library

One page per task, owned by a named person, stored where the team already works.

02 Review monthly

Thirty minutes to share a win, a miss and one change to a template.

03 Peer review AI-assisted work

Reviewers know when AI helped, and use the checklist.

04 Train on judgment

Practice with a deliberately flawed AI draft and ask the team to find the faults.

- Agree a standard note to put on AI-assisted documents so readers know how they were produced.
- Keep a record of the sources behind each deliverable.
- Protect the skill of facilitation and listening; do not replace workshops with generated summaries.

- Welcome people who choose not to use AI on a task, and ask why.

WORKING QUESTION

What is the first template your team would put in a shared library?

PITFALLS

Pitfalls and a worked scenario

09

The characteristic failures are smooth summaries, invented evidence and decisions that nobody owns.

- Treating a summary as a substitute for reading the notes.
- Letting AI choose criteria or priorities.
- Uploading identifiable interview or personal data to unapproved tools.
- Skipping validation with the people who do the work.
- Quoting generated statistics without a source.
- Losing the habit of listening in the room.

ILLUSTRATIVE SCENARIO (HYPOTHETICAL)

An analyst summarizes ten interviews about an approvals process. The summary says stakeholders broadly favor a single approval step. In fact, two finance staff strongly oppose it for control reasons, and their view was folded into a phrase about some concerns. A reviewer asks for the disagreements list, and the point surfaces before the proposal is sent. The fix was a standing request for disagreements and single-source views.

The scenario is invented, but flattening is a real tendency of summaries, human or machine. The remedy is process: always ask for what is contested, and always keep the originals within reach.

Halden & Company offers free assessments at halden.company/assessments to help analysis teams find safe, useful starting points, and you can contact the team at halden.company/contact.

**WORKING QUESTION**

What contested view in your current project is most at risk of being smoothed away?



30 / 60 / 90

A first quarter that produces evidence

10

Begin with one deliverable type, protect interview and personal data, and measure rework as well as speed.

**First 30 days: ground it**

- Agree the information rules for interview notes, data extracts and strategy documents.
- Sort your analysis tasks into green, amber and red.
- Time the last five instances of one deliverable to form a baseline.
- Write the requirements-from-notes template and the checklist.

Days 31 to 60: test it

- Pilot on one project with anonymized notes and a stated AI note on deliverables.
- Add process mapping and stakeholder theme templates.
- Run the reverse check on a sample of outputs each week.
- Start the shared library and a monthly review.



Days 61 to 90: decide

- Compare pilot with baseline on time, rework and traceability.
- Add options analysis and data hypothesis templates where results justify.
- Review the rules against any change in tools, contracts or privacy requirements.
- Decide what to scale, adjust or stop, and record the reasons.



GLOSSARY

Terms used in this publication

11



TERM	MEANING
Requirement	A stated need that a solution must meet, written so it can be understood and tested.
User story	A short statement of a need from a user's perspective, with a reason.
Acceptance criteria	Conditions that must be true for a requirement to be considered met.
Stakeholder synthesis	Combining input from many stakeholders into themes, agreements and disagreements.
Traceability	The ability to link each finding or requirement back to its source.
Process map	A representation of steps, actors, systems and decisions in a piece of work.
Options analysis	A structured comparison of alternatives against agreed criteria.
Hypothesis	A testable explanation proposed before analysis of the data.
Flattening	Loss of disagreement or minority views when input is summarized.
Anonymization	Removing or replacing names and identifiers so text does not expose individuals.
Hallucination	A fluent but false or unsupported output from an AI system.
Decision owner	The person accountable for choosing among options, with the analyst advising.



A note on use

General guidance only. Check privacy, employment and data-protection requirements that apply to you with qualified advisers.



TAKE THE NEXT STEP

Take the free Halden assessment at halden.company/assessments, or talk to us at halden.company/contact about turning this into a plan for your organization.

