

Plan Business Analysis Approach

Reference (Guidelines and Tools)

The following resources, if they exist, can be used to transform inputs into outputs:

- Business analysis performance assessment from previous initiatives
- Business policies
- Expert judgment
- Methodologies and frameworks
- Stakeholder engagement approach

Task Inputs and Outputs



Purpose or Need

To define an appropriate method to conduct business analysis activities.



Value

Ensure the efficient performance of all business analysis activities with a stakeholder-supported approach.



Solution

A defined business analysis approach that includes planned activities, tasks, and deliverables.



Techniques

Frequently used techniques:

- [Business cases](#)
- [Financial analysis](#)
- [Functional decomposition](#)
- [Item tracking](#)
- [Risk analysis and management](#)

Refer to the [BABOK Guide](#) for the complete list of techniques.



Stakeholder

Typically involves sponsors, project managers, domain subject matter experts, regulators, and any additional stakeholders identified.



Description of Change

This task describes the overall method that will be followed when performing business analysis work, what business analysis tasks will be performed, how and when business analysis tasks will be performed, and the business analysis deliverables that will be produced.

Consider...

Plan Business Analysis Approach provides a plan to follow in business analysis activities.

This task is equally important for an adaptive approach. Shorter-term execution steps are planned and aligned with what needs to be created during each iteration. This means repeating planning activities during each iteration and focusing on near-term delivery goals.

See [Guide to Product Ownership Analysis – 4.3 POA and Agile Planning Horizons](#)

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Plan Stakeholder Engagement

Reference (Guidelines and Tools)

The following resources, if they exist, can be used to transform inputs into outputs:

- Business analysis performance assessment
- Change strategy
- Current state description

Task Inputs and Outputs



Purpose or Need

To plan an approach for establishing and maintaining effective working relationships with the stakeholders.



Value

Identifying the stakeholders, how proposed changes may impact them, and how they might influence the change is vital to understanding what needs and expectations must be satisfied by a solution.



Solution

A defined stakeholder engagement approach that includes the list of the stakeholders, their roles and responsibilities, their main characteristics, and a collaboration and communication approach.



Techniques

Frequently used techniques:

- [Document analysis](#)
- [Interviews](#)
- [Organizational modelling](#)
- [Scope modelling](#)
- [Stakeholder list, map, persona](#)

Refer to the [BABOK Guide](#) for the complete list of techniques.



Stakeholder

Typically involves sponsors, project managers, domain subject matter experts, customers, and anyone who will impact or be impacted by the initiative.



Description of Change

This task helps identify the stakeholders relevant to the change, their role in the change, their main characteristics, the information business analysis professionals need from them (and vice versa), and how best to collaborate with them, taking into account their communication needs.

Consider...

Effectively engaging stakeholders is critical to success.

In the context of business analysis, it is vital to recognize when to involve cybersecurity experts. You do not need to be a cybersecurity expert, but you must know when to bring them in to guide the conversation effectively and address stakeholder concerns. Your role is to ask the right questions and ensure alignment with cybersecurity best practices.

See [Guide to Business Data Analytics – 2.1.2 Identify and Understand the Stakeholders](#)

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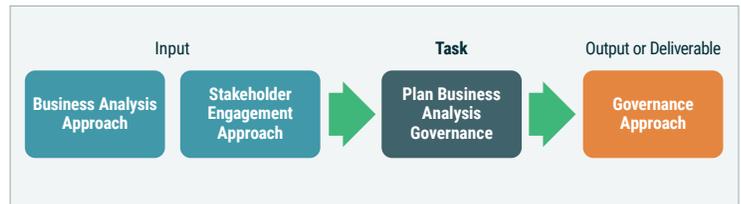
Plan Business Analysis Governance

Reference (Guidelines and Tools)

The following resources, if they exist, can be used to transform inputs into outputs:

- Business analysis
- Performance assessment
- Business policies
- Current state description
- Legal/regulatory information

Task Inputs and Outputs



Purpose or Need

To define how decisions are made about requirements and designs, including reviews, change control, approvals, and prioritization.



Value

Clarifying who decides what and when helps ensure that decisions are made properly and consistently during the initiative.



Solution

A defined governance approach that includes the list of decision-makers and a description of the change control, prioritization, and approvals process.



Techniques

Frequently used techniques:

- [Document analysis](#)
- [Interviews](#)
- [Organizational modelling](#)
- [Process modelling](#)
- [Workshops](#)

Refer to the [BABOK Guide](#) for the complete list of techniques.



Stakeholder

Typically involves sponsors, project managers, domain subject matter experts, regulators, and any additional stakeholders identified.



Description of Change

This task defines the decision-makers, change control process, prioritization approach, approval process, and information required to make a decision. It helps ensure that decisions about requirements and designs are made properly and consistently, following a process wherein decision-makers have the information they need when they need it.

Consider...

Governance processes, practices, and responsibilities are critical for a wide variety of initiatives.

Example: Consider a business intelligence initiative for which promoting an enterprise-wide view of information is important. Supporting this involves developing infrastructure services in the organization such as data governance and metadata management.

See [BABOK Guide – 11.2 The Business Intelligence Perspective and 11.2.1 Change Scope](#)

Plan Business Analysis Information Management

Reference (Guidelines and Tools)

The following resources, if they exist, can be used to transform inputs into outputs:

- Business analysis performance assessment
- Business policies
- Information management tools
- Legal/regulatory information

Task Inputs and Outputs



Purpose or Need

To develop an approach for storing and accessing business analysis information.



Value

Information management helps ensure that business analysis information is organized in a functional and useful manner, is easily accessible to appropriate personnel, and is stored for the necessary length of time.



Solution

A defined information management approach that describes how business analysis information will be stored, accessed, and actioned during and after change completion.



Techniques

Frequently used techniques:

- [Interviews](#)
- [Item tracking](#)
- [Lessons learned](#)
- [Mind mapping](#)
- [Process modelling](#)

Refer to the [BABOK Guide](#) for the complete list of techniques.



Stakeholder

Typically involves sponsors, domain subject matter experts, regulators, and any additional stakeholders identified.



Description of Change

This task defines how all the information developed by business analysis professionals (including requirements and designs) should be captured, organized, stored, traced, and integrated with other information for long-term use.

Consider...

From redesigning business processes and ensuring all business data is appropriately referenced and available in the new process to creating enterprise-level standards around data management, effectively managing information relevant to any change effort is an important element of success.

See [Guide to Business Data Analytics – 2.6.3 Data Strategy](#).

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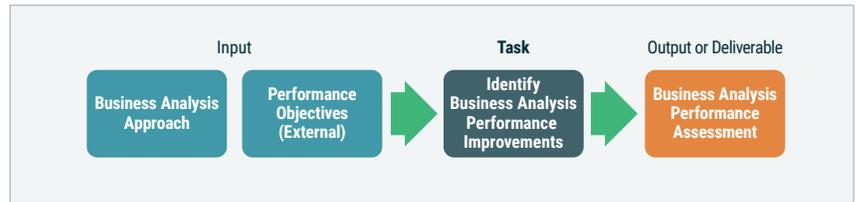
Identify Business Analysis Performance Improvements

Reference (Guidelines and Tools)

The following resources, if they exist, can be used to transform inputs into outputs:

- Organizational performance standards

Task Inputs and Outputs



Purpose or Need

To assess business analysis work and plan to improve processes where required.



Value

Create opportunities to understand and improve the performance of business analysis processes.



Solution

Business analysis performance assessment that includes the results of the assessment, identified root causes of variances from the expected performance, and proposed approaches to improve performance.



Techniques

Frequently used techniques:

- [Lessons learned](#)
- [Metrics and KPIs](#)
- [Process analysis](#)
- [Process modelling](#)
- [Root cause analysis](#)

Refer to the [BABOK Guide](#) for the complete list of techniques.



Stakeholder

Typically involves sponsors, project managers, domain subject matter experts, and any additional stakeholders identified.



Description of Change

This task describes managing and monitoring how business analysis work is performed to ensure that commitments are met and continuous learning and improvement opportunities are realized.

Consider...

Improving the process of outcome creation is a mainstay of adaptive approaches and is equally important for predictive and hybrid approaches. Embark on change only if it adds value. To ensure value, the performance of the business analysis efforts must be measured.

Example: Constantly looking for ways to improve both individual and team performance allows teams to create greater value, faster.

See [Guide to Product Ownership Analysis – 5.7.2 Optimize Value Delivery](#).

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