Business Analyst Case Study Summary

Dossier Direct – Legal Document Management Application

Project Type

Independent Business Analyst Case Study (Self-Driven)

1. Business Context & Problem Statement:

Dossier Direct is a legal document management web application designed to help lawyers manage client documents and questionnaires digitally.

The business problem addressed in this case study was that lawyers were manually collecting documents and client responses, which resulted in delays, missing information, repeated follow-ups, and limited visibility into case progress.

The objective of the system was to automate document collection, questionnaires, reminders, and tracking to improve efficiency and transparency.

2. Stakeholders & User Roles:

The application involves three primary stakeholders:

- **Lawyer:** Manages clients, sends document requests and questionnaires, tracks submission status, and reviews dashboards
- **Client:** Uploads documents, responds to questionnaires, and receives reminders
- **Admin:** Manages categories, users, permissions, and system configuration

3. My Role in the Case Study:

This was an independent Business Analyst case study.

My role was to analyze the available BRD, FRD, and SRS documentation to understand business objectives, stakeholder requirements, and functional workflows.
I focused on how business requirements are translated into functional behavior and how clear documentation supports effective communication between business and technical teams.

4. Requirement & Workflow Analysis:

As part of the analysis, I studied:

- Business requirements defined in the BRD (what and why)
- Functional workflows and use cases in the FRD (how the system works)
- System constraints and expectations in the SRS

I mapped end-to-end workflows such as client onboarding, document upload, and automated reminders to understand how the system addresses the business problem.

5. Example Use Case (End-to-End):

Use Case: Client Document Submission with Reminder

1. Lawyer sends a document request to the client
2. Client logs in and uploads the required documents
3. System validates the submission and updates status
4. Lawyer is notified of pending or completed submissions
5. If documents are not submitted within a defined time, automated reminders are triggered

This workflow reduces manual follow-ups and improves visibility for the lawyer.

6. Key Learnings & Insights:

- Clear separation of business, functional, and system requirements reduces ambiguity
- Well-defined workflows help identify gaps early in the process
- Automation of repetitive follow-ups significantly improves operational efficiency
- Business Analysts play a critical role in aligning stakeholder expectations with system behaviour