

Business Requirements Document (BRD)

Integrated Production and Service Management Platform.

December 2024

Version: 1.0 (Anonymized Version)

***This document is an anonymized representation of the real project; to comply with non-disclosure policies, all real names, identifiers, and sensitive data have been changed.**

Business Requirements Document

Project Name	Integrated Production and Service Management Platform
Version	1.0 (Anonymized Sample)
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Date	October 2024
Status	Approved

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1. Executive Summary

This Document is about the Integrated Production and Service Management Platform is a strategic initiative to transform existing manual, email-driven order handling into a modern, centralized digital system. Although day-to-day operations appeared functional, the underlying process was fragmented and relied on emails, spreadsheets, and informal tracking. All service entered through multiple inboxes, leading to delays, inconsistent information, and lack of transparency.

A structured current-state assessment revealed that the operations team spent nearly **### hours per month** (about **40%** of their capacity) manually extracting request details, updating spreadsheets, forwarding emails, and answering status queries. This resulted in slow processing times of **#-# days** before work assignment and follow-up error rates of **18–22%**, generating significant rework. Customers, especially top-tier clients, had no real-time visibility and frequently expressed frustration. One major client even indicated shifting business to a competitor offering a portal—putting nearly **₹#.# crore (\$###,###)** in annual revenue at risk.

These challenges also restricted scalability. Increased order volume required proportional increases in staff, limiting growth potential and increasing operational costs. It became clear that the existing model was no longer sustainable.

To resolve these issues, the project aims to replace manual processes with a centralized digital platform that automates request intake, routing, status updates, and communication. The expected impact includes a **70% reduction** in manual workload, processing time

reduced to **#-# hours**, and improved customer satisfaction through real-time tracking.

2. Project Background / Overview

operated in a fast-paced digital services environment. Despite steady demand, the company relied entirely on a manual, email-based operational model. All service requests arrived through multiple inboxes, were reviewed and logged manually, and were tracked across scattered spreadsheets and informal notes. While this approach worked when volumes were low, it became increasingly unsustainable as the business grew.

A detailed assessment highlighted significant operational pain points. The operations team spent nearly ### hours per month managing emails, extracting request details, distributing work, and responding to status inquiries. Processing times for new requests stretched to **#-#days** before reaching production teams, and 18–22% of requests required follow-ups due to missing or unclear information. Customers lacked real-time visibility and frequently contacted the team for updates, increasing workload and reducing satisfaction. Frustration among top-tier clients escalated, and one major customer signaled the possibility of moving to a competitor with better workflow transparency—placing critical revenue at risk.

These challenges directly impacted scalability. Any increase in order volume demanded proportional increases in staffing, limiting profitability and growth potential. Leadership recognized that continuing with the existing model would restrict the company's ability to serve clients efficiently.

To address these issues, the organization initiated the development of an Integrated Production and Service Management Platform to centralize request intake, automate workflows, reduce manual effort,

improve turnaround times, and deliver real-time visibility to customers and internal teams.

3. Business Objectives

The Integrated Production and Service Management Platform project was initiated to resolve critical operational inefficiencies, strengthen customer experience, and enable scalable business growth. The key business objectives are as follows:

3.1 Operational Efficiency Objectives

- **Reduce manual email processing by at least 70%** by automating request intake, data capture, assignment, and communication.
- **Cut request processing time from #–# days to #–# hours**, ensuring faster movement from customer submission to production assignment.
- **Decrease follow-up and clarification error rates from 18–22% to below 2%** through structured forms, automated validations, and centralized data.
- **Eliminate fragmented tracking** across spreadsheets, email threads, and informal notes by creating a single unified platform for all service requests.

3.2 Customer Experience Objectives

- **Provide customers with real-time visibility** into request status, proof approvals, and delivery timelines through a secure

customer portal.

- **Improve customer satisfaction scores** related to responsiveness and transparency, especially among top-tier clients.
- **Reduce dependency on manual customer support interactions** by enabling self-service status tracking and automated notifications.

3.3 Growth & Scalability Objectives

- **Increase operational capacity by approximately 40%** without adding proportional headcount, enabling the company to handle higher order volumes.
- **Protect key revenue accounts** at risk due to lack of transparency and slow communication.
- **Create a scalable digital infrastructure** that supports future service expansion and integration with additional tools or systems.

3.4 Strategic & Financial Objectives

- **Achieve payback within ##-## months** through labor savings, reduced rework, and revenue retention.
- **Position Cre8iveSkill as a technology-enabled service provider**, strengthening competitiveness in the global digital services market.

4. Project Scope

The scope of the Integrated Production and Service Management Platform includes all activities required to transition ##### from a fully manual, email-driven service workflow to a centralized, automated, and transparent digital system.

4.1 In-Scope:

- **Centralized Request Intake:** Development of a unified web-based portal and automated email ingestion system to capture all service requests in a structured format.
- **Workflow Automation & Assignment:** Auto-routing of requests based on service type, complexity, deadlines, and resource availability.
- **Production & QA Management:** Task queues for digitizers, artists, and QA teams with real-time status updates and activity logs.
- **Customer Visibility & Communication:** Customer portal for real-time tracking, proof review, approvals, notifications, and deliverable downloads.
- **Operational Dashboards & Reporting:** Metrics for processing time, workload distribution, SLA performance, error rates, and customer satisfaction.
- **Integrations:** Email server (IMAP/SMTP), file handling, and integration with embroidery digitizing specifications where relevant.

- **Change Management & Training:** User onboarding, training materials, and hypercare support post go-live.

4.2 Out-of-Scope:

- Integration with external accounting, ERP, or CRM systems.
- Redesign of existing pricing models or billing workflows.
- Automation of downstream manufacturing processes beyond digital workflow management.

5. Stakeholders

Executive Sponsor	Exec_01 (Redacted Sponsor Role)
Programme Manager	PM_Alpha (Redacted Programme Lead)
Product Owner	PO_Xen (Redacted Product Owner Role)
QA Analyst	QA_Tau (Redacted Quality Analyst)
Data Analyst	DA_Nebula (Redacted Data Specialist)
Business Analyst	Sonal M. Khobragade
Major Client Representatives	ClientA, ClientB (anonymized)

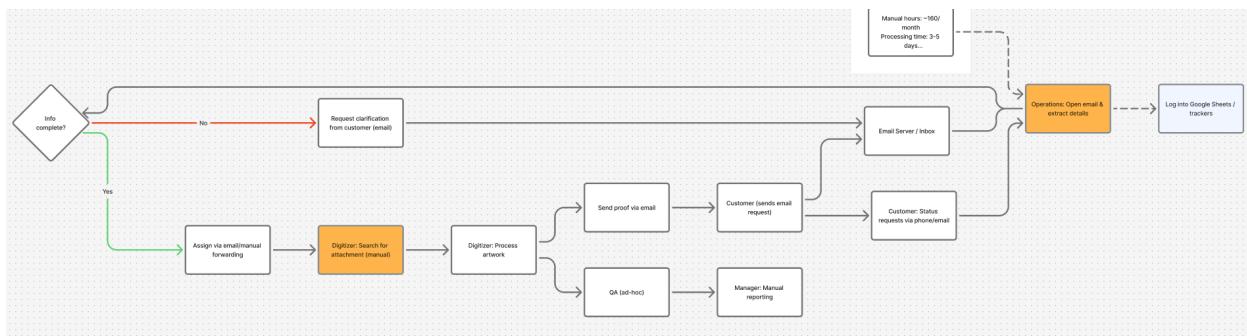
6. Business Requirements

ID	Requirement	Priority	Acceptance Criteria
BR-1	The system must provide a centralized digital platform to capture all service requests through a structured web form or automated email ingestion.	Must	100% of orders through system, <2% intake errors
BR-2	The system must automatically acknowledge customer requests within 5 minutes of submission.	Must	All orders trackable end-to-end in dashboard
BR-3	The platform must auto-route requests based on service type, deadline, and resource availability.	Must	95% correct routing; <1hr assignment
BR-4 BR-5	Digitizers, vector artists, and QA teams must have dedicated dashboards showing prioritized task queues.	Must	95% on-time comms, <30min customer replies
	Customers must be able to track real-time status of their orders through a secure portal.	Must	All files retrievable/auditable; history intact
BR-6	The system must support uploading, storing, and retrieving artwork files securely.	Should	Metrics display live, support strategic review
BR-7	Automation must reduce request follow-up error rates from 18–22% to below 2%.	Must	Zero critical breaches, full audit trails

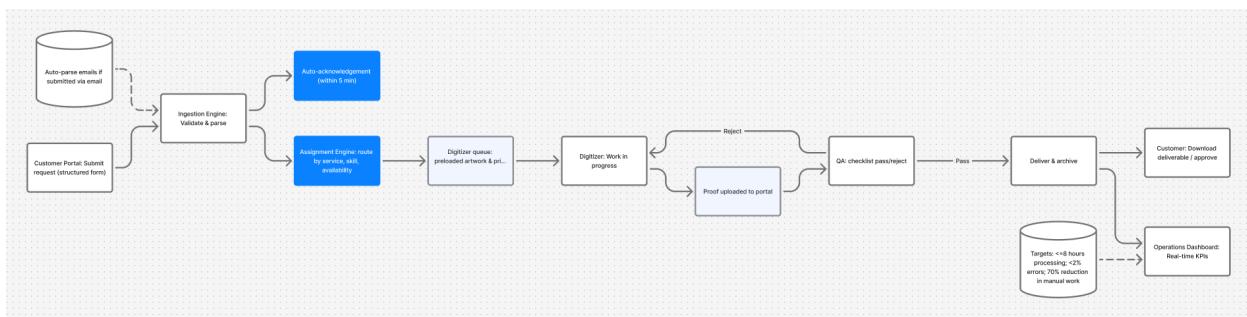
BR-8	The platform must generate operational dashboards and performance reports.	Should	≥90% feedback captured, issues triaged in 1d
BR-9	The system must support role-based access control for customers, operations, production, and QA teams.	Must	
BR-10	The platform must scale to support a 40% increase in order volume without additional headcount.	Must	RBAC works, test cases pass for all role views

7. Process Flow Diagrams.

7.1 As-Is Process: The current workflow relies entirely on manual email coordination and spreadsheet tracking, causing 4+ hour processing delays and 8% error rates. Orders flow through disconnected steps requiring constant human intervention, from email receipt through manual data entry, file organization, work assignment, and customer communication.



7.2 TO-BE Process: The automated platform transforms operations through intelligent workflow orchestration, reducing processing time to 90 minutes with real-time tracking and proactive notifications. Digital order intake feeds directly into automated assignment algorithms that route work based on skills and capacity, while integrated quality workflows ensure consistent standards.



8. Functional Requirements:

FR ID	Functional Requirement	Description
FR-01	Centralized Request Intake	The system must capture all service requests via a structured web form and automated email ingestion.
FR-02	Automated Acknowledgement	A confirmation notification must be sent within 5 minutes of submission to improve responsiveness and reduce manual follow-ups handled by the operations team.
FR-03	Auto-Routing & Assignment	The system must automatically assign requests based on service type, SLA priority, skill set, and workload availability.
FR-04	Production Work Queue	Digitizers, vector artists, and QA staff must have real-time task queues showing deadlines, priority, files, and instructions to eliminate manual email searching and ambiguity in work allocation.
FR-05	Status Tracking & Workflow Updates	The platform must update and display statuses across all stages (Received → Assigned → In Progress → QA → Delivered), enabling visibility for internal teams and customers.
FR-06	Proof Upload & Customer	Digitizers must upload proofs to the

	Review	portal, and customers must approve or request revisions digitally to reduce email dependency and improve turnaround times.
FR-07	QA Review Workflow	The system must support structured pass/reject workflows with comments to ensure consistent quality and reduce downstream corrections.

9. Non-Functional Requirements

NFR Category	Non-Functional Requirement	Description / Rationale
Performance	System Response Time	The platform must load all dashboards, queues, and request details within 2–4 seconds to support high-volume operational use.
	Processing Throughput	The system must process a minimum of 500 concurrent requests (intake → assignment → queue update) without degradation, ensuring scalability during peak volume.
Availability & Reliability	Uptime	The platform must maintain 99.5% uptime , excluding planned maintenance, to support global customers submitting requests around the clock.
	Failover & Recovery	Automated backups must run daily, with the ability to recover the system within 30 minutes during failures to protect business continuity.
Security & Access Control	Role-Based Access	The system must enforce strict RBAC for customers, operations, digitizers, QA, and managers to protect sensitive artwork files and customer information.

	Data Security	All data in transit and at rest must be encrypted (TLS 1.2+, AES-256) to prevent unauthorized access.
Usability	Interface & Navigation	The UI must be intuitive, requiring no more than 2–3 clicks for users to reach core actions.
	Accessibility	The platform should comply with WCAG 2.1 Level AA , ensuring accessibility for all user groups.
Scalability	Load Scaling	The system must scale to support 40% growth in request volume without additional infrastructure or operational staff.
Audit & Monitoring	Audit Trail	All status changes, assignments, uploads, and approvals must be logged for traceability, compliance, and dispute resolution.

10.Assumptions.

The following assumptions have been established to guide the planning, design, and implementation of the Integrated Production and Service Management Platform. These assumptions ensure clarity in expectations, reduce ambiguity, and provide a stable foundation for decision-making throughout the project lifecycle.

10.1 Operational & Business Assumptions

- The volume of service requests will continue to increase and the organization requires a scalable digital workflow system to avoid proportional increases in headcount.
- All service lines (digitizing, vector art, image retouching, custom design) will follow standardized intake, assignment, and production workflows in the new platform.
- Existing manual processes (email-based tracking, spreadsheets, ad-hoc QA) will be fully replaced by the new digital system.
- Customers will adopt the new portal for submitting requests, tracking status, reviewing proofs, and downloading deliverables.

10.2 Technical Assumptions:

- The development team will have access to all necessary business rules, legacy files, historical data, and email samples required to build accurate ingestion logic.
- Integration with the company's email server (IMAP/SMTP) will be supported and stable throughout implementation.
- The platform will operate in a cloud-based environment with sufficient storage for artwork files and historical request archives.
- User roles, permissions, and authentication requirements will be approved by management before development of access-control features.

10.3 Resource & Change Management Assumptions

- All internal teams (operations, digitizers, QA) will participate in UAT, training, and process adoption activities.
- Leadership will support organizational change initiatives to ensure smooth transition from manual to digital workflows.

11.1 High-Level Project Phases.

Phase 1: Discovery & Current-State Assessment

- Conduct interviews, workflow shadowing, and time studies to document existing pain points.
- Validate operational inefficiencies such as manual processing (160 hours/month), 3–5 day assignment delays, and 18–22% error rates.
- Establish baseline KPIs for improvement.

Phase 2: Business Requirements & Future-State Definition

- Develop BRD, user personas, and to-be workflows.
- Define functional and non-functional requirements addressing automation, customer visibility, and scalability.
- Align design with operational constraints and business priorities.

Phase 3: System Design & Development

- Build modules for request intake, validation, assignment engine, production queues, QA workflow, customer portal, and notification engine.
- Conduct iterative reviews with stakeholders to refine functional alignment.

Phase 4: Testing & Quality Assurance

- Execute functional, integration, and UAT cycles using real service scenarios.
- Validate accuracy, usability, performance, and end-to-end workflow readiness.

Phase 5: Training, Change Enablement & Go-Live

- Deliver role-based training for operations, production, QA, and customer support teams.
- Prepare communication materials and go-live readiness plans.
- Deploy system and provide hypercare support.

Phase 6: Post-Implementation Review & Optimization

- Measure outcomes against KPIs, capture feedback, address defects, and refine workflows for continuous improvement.

11.2 Critical Dependencies.

Internal Dependencies:

Dependencies Area	Description	Impact if Not Met
Email Server Integration	Stable IMAP/SMTP access is required for automated email ingestion and acknowledgements.	Ingestion failures, manual workload remains high.
Stakeholder Availability	Operations, digitizers, QA, and management must participate in workshops, UAT, and sign-offs.	Incomplete requirements, rework, delayed adoption.
Data Samples & Legacy Files	Access to real customer emails, artwork files, and historical data is needed to build accurate parsing rules.	Incorrect validation logic; higher post-launch errors.
Vendor Development Capacity	The outsourced development team must allocate required resources across backend, UI, QA, and DevOps.	Delayed releases, quality issues.
Infrastructure Readiness	Cloud environment, storage, backup systems, and security configurations must be provisioned before deployment.	Go-live blockage and performance risks
Customer Adoption Readiness	Key clients must be prepared to shift from email to the new portal.	Reduced ROI and continued dependence on manual processes.
Change Management Support	Leadership must support training, process standardization, and behavioral change.	Resistance to adoption; partial use of the system.

12 .Project Timeline and Deliverables.

Project Phase	Timeline	Key Deliverables
Phase 1: Discovery & Current-State Analysis	###	Discovery report, as-is process maps, baseline KPIs, stakeholder matrix
Phase 2: BRD & Future-State Design	###	BRD, to-be workflows, user personas, solution design blueprint
Phase 3: System Design & Development	###	Functional modules (intake, assignment engine, production queues, QA workflow, portal), data model, APIs
Phase 4: Testing (UAT, Functional, Integration)	###	Test plans, UAT scripts, defect logs, test results, release readiness report
Phase 5: Training, Change Enablement & Go-Live	###	Training materials, job aids, deployment plan, go-live execution, hypercare support

13. Stakeholder Approval.

Role	Name	Title	Signature	Date
Executive Sponsor	Exec_01	Redacted Sponsor Role
Programme Manager	PM_Alpha	Redacted Programme Lead
Product Owner	PO_Xen	Redacted Product Owner Role
Business Analyst	Sonal Khobragade	Business Analyst
Quality Analyst	QA_Tau	Redacted Quality Analyst

14. Glossary of Terms.

Term	Definition
Service Request	A customer-submitted job requiring digitizing, vector art, image retouching, or custom design services. Captured via portal or automated email ingestion.
Customer Portal	A web-based interface where customers submit requests, track status, review proofs, and download final deliverables.
API Application Programming Interface	Set of protocols and tools for building software applications that allows different software systems to communicate with each other
File Version Control	System for managing changes to files over time, maintaining history and enabling rollback to previous versions
KPI Key Performance Indicator	Quantifiable measure used to evaluate success in meeting business objectives
Order Lifecycle	Complete process flow from initial customer request through final service delivery and closure
Real-time Tracking	Immediate visibility into order status and progress without delays or manual update
REST API	Representational State Transfer - architectural style for web services enabling system integration
SLA (Service Level Agreement)	Contract defining expected service standards, response times, and performance metrics
SMTP	Simple Mail Transfer Protocol
TLS	Transport Layer Security
UX	User Experience
XML	Extensible Markup Language

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