**BUSINESS REQUIREMENT DOCUMENT**

**PROJECT NAME: Client Satisfaction Solution**

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[1. ACRONYMS 4](#_Toc168044528)

[2. INTRODUCTION 4](#_Toc168044529)

[2.1 Document Purpose 4](#_Toc168044530)

[2.2 Background 4](#_Toc168044531)

[3. SCOPE 4](#_Toc168044532)

[3.1 Exclusions 4](#_Toc168044533)

[3.2 Context Diagram 5](#_Toc168044534)

[4. ORGANISATIONAL PROCESS 5](#_Toc168044535)

[4.1 Process Description 5](#_Toc168044536)

[5. REQUIREMENTS 6](#_Toc168044537)

[5.1 Business Requirements 6](#_Toc168044538)

[5.2 Non-Functional Requirements 6](#_Toc168044539)

[6. CONSTRAINTS 8](#_Toc168044540)

[7. ASSUMPTIONS 9](#_Toc168044541)

[8. DEPENDENCIES 10](#_Toc168044542)

[9. RISKS 10](#_Toc168044543)

[10. APPROVALS 12](#_Toc168044544)

# ACRONYMS

GDPR : General Data Protection Regulation

POPIA : Protection of Personal Information Act

CRM : Customer Relationship Managementgi

ERP : Enterprise Resolve Planning

API : Application Programming Interface

# INTRODUCTION

# Document Purpose

This document serves as a proposal for the implementation of a Client/Customer Satisfaction Tool within the company, aimed at capturing client feedback and measuring satisfaction levels. Its primary purpose is to outline the necessity and benefits of such a tool, along with the proposed approach for its implementation.

## Background

The absence of a structured system for collecting client feedback at the organization poses a challenge in accurately gauging client satisfaction levels and identifying areas for improvement. This lack inhibits the company's ability to tailor services to meet client expectations and make informed decisions. To address this, there is a pressing need for the implementation of a Client/Customer Satisfaction Tool, which will enable the company to proactively engage with clients, solicit feedback, and leverage insights to enhance service delivery and foster stronger client relationships.

# SCOPE

# Exclusions

* This project does not encompass the redesign or overhaul of existing services offered by the company.
* It does not involve the integration of the Client/Customer Satisfaction Tool with other internal systems beyond basic data storage and retrieval.
* The scope does not extend to the implementation of any hardware infrastructure or network modifications.

## Context Diagram

3. Insight & Actions

1. Provide feedback

2. Access feedback data

* Capture feedback
* Store it
* Analyze
* Generate reports

Reporting system

Company employees

# ORGANISATIONAL PROCESS

# Process Description

**Process Flow Diagram**

Initiation

Feedback submission

Data Capture

Feedback Analysis

Monitoring

Implementation

Action planning

Insight generation

Reporting

# 4.2 Business Rules

The system must provide multiple feedback collection channels, ensure data privacy and security, automatically acknowledge and prioritize feedback for timely responses, and securely store data with regular backups. It should offer tools for feedback analysis, generate insights, and create reports on satisfaction metrics, facilitate action planning and tracking, enable continuous monitoring and review, and generate customizable reports. The system should support continuous improvement initiatives, track the impact of changes, and ensure compatibility with existing in the company’s systems and future scalability through API support.

# REQUIREMENTS

# Business Requirements

The system must provide multiple feedback collection channels with customizable forms, ensure data privacy and secure storage, automatically acknowledge and prioritize feedback for timely responses, and securely store data with regular backups and retention policies. It should offer tools for analyzing feedback, generating insights, and creating satisfaction reports, facilitate action planning and tracking, enable continuous monitoring and review with real-time updates, and generate customizable reports. Additionally, it should support continuous improvement initiatives by tracking the impact of changes and ensure compatibility with existing company systems, supporting future scalability and connectivity through APIs.

## Non-Functional Requirements

The system must handle feedback from many users simultaneously without slowing down, complete feedback analysis and report generation within 5 minutes for up to 10,000 entries, and be easily scalable to manage increasing feedback and user numbers. It should ensure 99.9%.

## 5.3 Use Case

**Submitting Feedback through Customer Satisfaction Tool**

**Actors:**

* Customer: The individual or entity providing feedback about organization’s services.

**Preconditions:**

* The client has access to the Client Satisfaction Tool.
* The client is logged into the system if required.

**Main Flow:**

**Initiate Feedback Submission:**

* The customer accesses the Client/Customer Satisfaction Tool through the provided interface.
* They navigate to the feedback submission section.

**Provide Feedback:**

* The customer selects the type of service or interaction they are providing feedback about.
* They enter their feedback in the provided text field.
* Optionally, they may choose to submit feedback anonymously.

**Submit Feedback:**

* After review, the customer confirms their submission.
* The system validates the feedback entry.

**Feedback Confirmation:**

* The system acknowledges the successful submission.
* Optionally, a reference number or confirmation message may be provided.

**Alternate Flow:**

* If the customer chooses to submit feedback anonymously:
* Personal identification fields are omitted.
* The system processes and stores the feedback entry without identifiable information.

**Post conditions:**

* The customer's feedback is successfully submitted and stored in the system's database.
* Follow-up communication may be initiated based on the feedback provided.

**Exceptional Flows:**

**Invalid Feedback Entry:**

* The system prompts the customer to correct any incomplete or invalid data.

**Technical Issues:**

* Error messages are displayed, advising the customer to try again later.

**Unauthorized Access:**

* Access is denied, prompting the user to log in or seek assistance.

# CONSTRAINTS

|  |  |
| --- | --- |
| Constraint | Details |
| Time Constraint | * Completion within 6 months. |
| Budget Constraint | * Adherence to limited budget. * Minimization of new purchases, utilizing existing resources. |
| Resource Constraint | * Limited availability of skilled personnel. * Effective resource management for timely delivery. |
| Infrastructure Constraint | * Compatibility with existing infrastructure. * Minimal and cost-effective changes/upgrades. |
| Regulatory Constraint | * Compliance with data protection regulations (e.g., GDPR, POPIA). * Industry-specific regulatory compliance. |
| Technology Constraint | * Compatibility with diverse devices and platforms. * Support for common web browsers and operating systems. |
| User Adoption Constraint | * Resistance to change and adoption challenges. * Training and communication strategies for user acceptance. |
| Integration Constraint | * Seamless integration with CRM and ERP systems. * Data consistency and security ensured. |
| Scalability Constraint | * Ability to accommodate growth in clients, feedback, and users. * Scalability considerations in design and development. |
| Geographical Constraint | * Accessibility and compliance with local regulations in multiple regions. * Consideration of language, culture, and regional regulations. |

# ASSUMPTIONS

* **Stakeholder Input:** Timely input and feedback from stakeholders will be available.
* **System Integration:** Existing CRM and ERP systems have APIs for integration.
* **Client Technology Access:** Clients have access to internet and necessary technology for feedback submission.
* **User Computer Skills:** Employees and management possess basic computer skills.
* **Data Accuracy:** Feedback provided by clients is assumed to be accurate.
* **Compliance Awareness:** Stakeholders understand the importance of compliance with regulations.
* **Budget and Resource Allocation:** Adequate budget and resources are allocated for the tool.
* **Technical Infrastructure:** Existing infrastructure meets hosting requirements.
* **Change Management Support**: Adequate support for change management activities is available.
* **Continuous Improvement Culture:** The organization has a culture promoting continuous improvement through client feedback.

# DEPENDENCIES

The successful integration of the tool depends on the availability and functionality of APIs from existing CRM and ERP systems. Timely input and feedback from stakeholders are necessary for project progression, and skilled personnel availability is crucial for project completion. The readiness and compatibility of existing technical infrastructure are essential for hosting the tool, and compliance with data protection regulations and industry standards is mandatory. Adequate support for change management activities is required for user adoption, and the availability and allocation of budgetary resources impact project progress. Additionally, reliance on third-party software or services may affect tool development and functionality, and compliance with regulatory requirements may involve approval processes that influence the project timeline. The organization's commitment to leveraging feedback for continuous improvement is vital for the tool's effectiveness.

# RISKS

**Integration Challenges:**

* Difficulty integrating the tool with existing systems due to complex APIs or compatibility issues.

**User Adoption Resistance**:

* Resistance from employees and clients to adopt the tool, impacting its effectiveness.

**Data Security Breaches**:

* Security vulnerabilities leading to data breaches or unauthorized access to client feedback.

**Performance Degradation:**

* Performance issues such as slow response times or system downtime affecting user experience.

**Budget Overruns:**

* Exceeding allocated budget due to unforeseen expenses or resource constraints.

**Regulatory Compliance Failures**:

* Failure to comply with data protection regulations, resulting in legal repercussions.

**Lack of Stakeholder Engagement**:

* Insufficient involvement or feedback from stakeholders, leading to misalignment with business objectives.

**Vendor Dependency:**

* Dependence on third-party vendors for critical components or services, risking delays or disruptions.

**Competitive Pressure:**

* Pressure from competitors offering similar solutions, impacting market share or differentiation.

**Technological Obsolescence:**

* Risk of the tool becoming outdated or incompatible with emerging technologies.