Business Requirements Document (BRD)

Project: NEXEN Client Portal Optimization

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# 1. Project Overview

The NEXEN Client Portal is a web-based platform used by institutional clients to monitor trade statuses, submit settlement instructions, and access reports. The current instruction entry process is time-consuming, and trade data updates are delayed, impacting client satisfaction and operational SLAs. This project aims to enhance user experience and data accuracy within the platform.

# 2. Business Objective

To reduce instruction submission errors, improve trade status visibility, and enhance overall client satisfaction by optimizing the UI/UX and backend logic of the NEXEN portal.

# 3. Problem Statement

- Clients report delays in trade data updates  
- Navigation for instruction submission is complex  
- Reports are inconsistent in format and fields

# 4. Scope

In Scope:  
- Real-time trade status sync  
- UI improvements to instruction forms  
- Report standardization  
  
Out of Scope:  
- Integration with external systems  
- Changes to trade matching rules

# 5. Stakeholders

- Client Servicing Team  
- Operations – Settlements  
- Technology – Portal Development Team  
- Compliance (for instruction format validation)

# 6. Assumptions

- Real-time data sync is technically feasible  
- Clients will accept standardized report formats

# 7. Constraints

- Changes should not impact downstream trade matching systems  
- Minimal downtime during rollout