**Vision and Scope**

1. **Business Requirements**
   1. **Background**

Currently Efes Inc. does not have a website for prospective clients to learn about company and leave applications for services. Existing clients must visit company office to leave an application, which lowers their experience. Application processing takes 2-3 days as it’s held by employees from manager to manager.

* 1. **Business Opportunity**

Develop a website that will provide clients with opportunity to submit applications remotely and get quick response.

* 1. **Business Objectives**

BO-1: Design and build a website, which will provide clients an ability to create a personal account where they can find a ready online form to fill in.

BO-2: Institute a system that will process, validate and make initial deсision on incoming applications before redirecting to managers.

BO-3: Reduce operational costs associated with manual data entry by implementing an automated workspace.

* 1. **Success Metrics**

SM-1: 2 month since web-site launch application handling capacity will increase 50% daily.

SM-2: One month after product launch clients’ satisfaction rate will reach 90%.

SM-3: 6 month after release company expenses for cumbersome application processing will decrease by 40%.

* 1. **Vision statement**

Provide clients website with which they can submit an application remotely and learn more about company services.

Accelerate application processing with automatic system so that company will take into work and response to 50% more clients.

* 1. **Business Risks**

R-1: Possible attacks on clients’ personal data.

R-2:Project release delays due to integration partners.

* 1. **Business Assumptions and Dependencies**

AS-1: Employees and clients will be willing and able to adopt the new system with minimal resistance and will successfully complete the provided training.

AS-2: External data sources, such as income verification services and credit bureaus, will provide reliable and timely access to the necessary data.

D-1: Successful integration with external income verification services and credit bureaus.

D-2: Effective training programs for employees and support for clients using the new system.

1. **Limitations**
   1. **Major Features**

FE-1: Ability for users to register or sign up to their account.

FE-2: Ability to recover login and password safely.

FE-3: Ability to fill in a loan application.

FE-4: Ability for site administrators to access applications processing details.

FE-5: Ability for site administrators to change acceptance criteria for automatic applications processing.

FE-6: Ability for clients to check their application status updates.

FE-7: Ability to fill the application with automatic guidance.

FE-8: Ability for users to save their corporate bank account info for future loan payments.

FE-9: Ability for users to schedule their monthly loan payments.

* 1. **Scope of Initial and Subsequent Releases**

|  |  |  |
| --- | --- | --- |
| **Feature** | **Now (Release 1)** | **Later** |
| FE-1 | Release 1 |  |
| FE-2 | Release 1 |  |
| FE-3 | Release 1 |  |
| FE-4 | Release 1 |  |
| FE-5 |  | Release 3 |
| FE-6 | Release 1 |  |
| FE-7 |  | Release 3 |
| FE-8 |  | Release 2 |
| FE-9 |  | Release 2 |

* 1. **Limitations and Exclusions**

LI-1: The timeline of the project can’t be expanded beyond 6 month.

LI-2: Website is mobile-only.

Ex-1: Any features that require business process changes may not be included in project.

1. **Business Context**
   1. **Project Priorities**

|  |  |  |
| --- | --- | --- |
| **Dimension** | **Constraint** | **Change Management** |
| **Features** | All features in realize must be fully functional | Any feature changed must be approved by the stakeholders and updated in BRD |
| **Quality** | 99.9% uptime in the site | Any changes to scope based on QA results will require prior approval and updates to the BRD |
| **Schedule** | MVP must be launched in the first realize and other functionality will be launched within 6 month of the project start | Project schedule can’t be changed |

* 1. **Deployment Considerations**
* Hosting environment must be tested in advance to be able to handle potential traffic spikes
* Company managers will need site administration training to be able to navigate clients right after MVP launch

1. **Document approval**

|  |  |  |
| --- | --- | --- |
| **Group** | **Stakeholder** | **Approval Date** |
| Business Area | Carlos Peres |  |
| Business Area | Sergey Busel |  |
| Business Area | Dmitry Yakovenko |  |
| QA | Kate Smith |  |

1. **Change Management**

|  |  |
| --- | --- |
| **Group** | **Stakeholder Name** |
| Business Area | Carlos Peres |
| Business Area | Dmitry Yakovenko |
| Business Area | Sergey Busel |

1. **Quality Assurance Approvals**

|  |  |
| --- | --- |
| **Group** | **Stakeholder** |
| Business Area | Carlos Peres |
| Business Area | Dmitry Yakovenko |
| QA | Kate Smith |