Requirements Clarity Pack

Sample deliverable. Client names and identifying details are anonymized to respect client privacy.

Client type	Country	Deliverable
National social services agency	**Canada**	**Requirements Pack**

Client Situation

The agency was modernizing an online intake path. Stakeholder notes, draft forms, policy comments, and delivery assumptions were scattered across several files. The delivery team needed one structured package before backlog refinement.

Client Request

Organize the source material into business requirements, functional requirements, non functional requirements, business rules, open questions, risks, assumptions, and next steps.

Value Created

The client received a single source of truth for intake scope, system behavior, quality expectations, business rules, and policy questions.

How The Work Creates Value

Source Inputs

Notes, drafts, workshops, files, decisions

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BA Analysis

Structure, gaps, rules, risks, options

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Client Output

Requirements Pack

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Business Value

Decision ready clarity and delivery momentum

Risk And Decision Heat Map

Low urgency	**Medium urgency**	**High urgency**
Monitor	**Plan action**	**Act first**
Document	**Prioritize**	**Escalate**

Work Sequence

Now

Confirm objective and source inputs

Next

Resolve decisions and prepare the work product

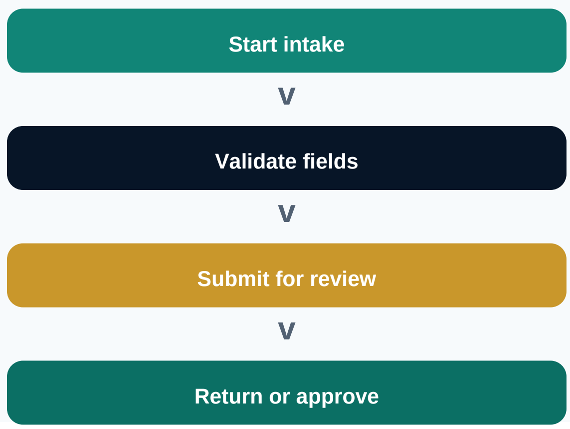
Then

Use output for planning, signoff, vendor alignment, or leadership review

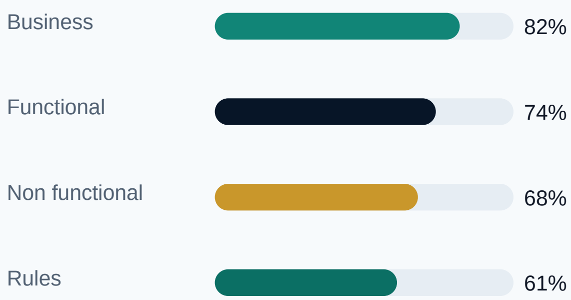
Visual Work Product Snapshot

This page adds a visual layer to the analysis so the client can quickly understand patterns, priority, and delivery flow.

Intake Requirement Flow



Requirement Mix



What The Client Receives

Deliverable Component	Purpose	Client Value
Business requirements	Business capabilities and outcomes required by the service.	Shared scope baseline.
Functional requirements	Specific system behaviors and user actions to support.	Delivery ready backlog input.
Non functional requirements	Quality, security, accessibility, performance, and audit expectations.	Reduced late discovery risk.
Business rules	Policy and operational decision logic.	Clearer implementation decisions.
Risks and open questions	Unresolved items that need owner confirmation.	Better governance and signoff.

Quality Standard

Each work product is reviewed for business clarity, decision usefulness, delivery readiness, and traceability to source input. The goal is not to create more documentation. The goal is to create material that helps the client make decisions and move work forward.

Business Requirements Extract

ID	Business Requirement	Priority	Acceptance Signal
BR-01	The service shall allow users to start, save, and submit an intake request through a guided online path.	High	User can resume a draft and submit when complete.
BR-02	The service shall capture consent before personal information is shared with another program area.	High	Consent status is stored and visible to authorized staff.
BR-03	The service shall show clear status labels for incomplete, submitted, under review, returned, and closed.	High	User and staff views show matching status.
BR-04	The service shall allow staff to return a submission with a plain language reason.	Medium	Returned reason appears in user notification.
BR-05	The service shall allow authorized staff to view intake history and prior return reasons before making a decision.	High	Staff can see the full review trail.
BR-06	The service shall provide a printable summary of submitted information for internal review and records management.	Medium	Summary can be generated from the submitted record.
BR-07	The service shall support separate user and staff views so sensitive internal notes are not shown to requesters.	High	Requester view excludes internal notes.
BR-08	The service shall allow program staff to categorize intake records by service type, urgency, and completeness.	Medium	Records can be filtered by category.
BR-09	The service shall record key dates for submission, return, resubmission, review start, and closure.	High	Timeline is visible for each record.
BR-10	The service shall support service standard reporting based on intake status and elapsed time.	Medium	Managers can extract service standard data.

Functional Requirements Extract

ID	Functional Requirement	Role	Priority
FR-01	The portal shall validate mandatory fields before final submission.	Requester	High
FR-02	The portal shall allow staff to assign an intake record to an internal queue.	Case worker	High
FR-03	The portal shall generate a timestamped submission confirmation.	System	Medium
FR-04	The portal shall allow authorized staff to add internal notes that are not visible to the requester.	Case worker	Medium
FR-05	The portal shall allow staff to return a submission and select a return reason from an approved list.	Case worker	High
FR-06	The portal shall notify the requester when a submission is returned for more information.	System	High
FR-07	The portal shall allow the requester to upload supporting documents before final submission.	Requester	High
FR-08	The portal shall prevent unsupported file types from being uploaded.	System	Medium
FR-09	The portal shall allow supervisors to reassign intake records between queues.	Supervisor	Medium
FR-10	The portal shall allow staff to export an intake summary for internal review.	Case worker	Medium

Non Functional Requirements Extract

ID	Requirement	Category	Target
NFR-01	The intake path shall meet WCAG 2.1 AA accessibility expectations.	Accessibility	Mandatory
NFR-02	Submission activity shall be audit logged with user, timestamp, and action.	Audit	Mandatory
NFR-03	Personal information shall be visible only to authorized roles.	Privacy	Mandatory
NFR-04	The form shall support autosave feedback within 3 seconds of user action.	Performance	Target
NFR-05	The portal shall encrypt uploaded supporting documents at rest.	Security	Mandatory
NFR-06	The portal shall maintain audit history for status changes and queue assignment.	Audit	Mandatory
NFR-07	The portal shall support browser based use without requiring client side plug ins.	Usability	Mandatory
NFR-08	The portal shall display plain language validation messages for user correction.	Usability	Target
NFR-09	The portal shall support role based access for requester, case worker, supervisor, and administrator roles.	Security	Mandatory
NFR-10	The portal shall provide clear error handling if a file upload fails.	Reliability	Target

Client Handoff Notes

Handoff Area	What The Client Receives
Decision support	A clear view of what has been confirmed, what remains open, and which decisions are needed.
Delivery support	Structured material that can be used by product owners, project managers, vendors, analysts, and testers.
Leadership support	A concise summary suitable for briefing sponsors, executives, or steering committee members.
Traceability support	A practical link between the client ask, the source issue, the analysis performed, and the recommended next step.

Action Register

Action	Why It Matters	Timing
Confirm decision owners	Prevents unresolved questions from blocking delivery.	Before next planning session
Review open questions	Separates true gaps from items already known by the business.	Within 5 business days
Approve priority items	Gives the delivery team clear sequencing.	Before work begins
Store final package	Maintains a single source of truth.	After approval