Business Requirements Document (BRD) Gathering Template

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# Context

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This document is used to track and affirm the benefits of a project, through developing the methods used for tracking.

This should be filled out by the Business Analyst with support from the Project Manager/Product Owner/Project Lead.

*We create and share this content to help give back to the community, and give aspiring Business Analysts the guidance we wish we had when we started out.*

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# Document Control

## Summary of Document Changes

|  |  |  |  |
| --- | --- | --- | --- |
| **Version** | **Date** | **Author** | **Reason** |
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## Quality Assurance

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| **Version** | **Date** | **Reviewer** |
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## Document Approver

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| **Name** | **Date** | **Signature** |
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# Executive Summary

# Reconcile business case benefits

<Consider the following points for inclusion in this section: Participation in business case benefits development Economic appraisal calculations

Current Project scope/direction Analysis of Business Case Benefits>

# Secure Benefit Ownership

<Consider the following points for inclusion in this section: Benefits Owners Engagement

Roles and benefit accountabilities Business problems to be resolved

Operational obstacles and risks: Benefits Risk Register Benefits Measures and Targets: Benefits Realisation Register>

# Develop Benefits Activity Plan

<Consider the following points for inclusion in this section:

Business, Technology, Organisational, Processes and People tasks Benefits Realisation Pathway map

Benefits Result Chain

Review project plan for benefit and change management tasks Benefits Realisation Activity Plan

Communication materials – benefits at each level and motivating factors>

# Conduct Baseline measures

<Consider the following points for inclusion in this section: Describe how measures will be collected

Detail the effort and time frames

Detail any tools to be used such as satisfaction surveys The sign-off process for the measures>

# Benefits and Organisational Change

<This section should detail the process changes and initiatives required to produce each benefit. Benefits and change work together. The Change Management group typically develop “Stop, Start and Continue” process lists>

# Go live activities

<Consider the following points for inclusion in this section:

Describe how the quick wins will be identified and communicated. List the key processes to stop and those which will improve>

# Post Go Live Benefits Tracking

<Consider the following points for inclusion in this section:

Describe how the benefits data collection and reporting process will be conducted post implementation.

Indicate the groups and stakeholders who will receive the information.

Some benefits will not meet target and it will be necessary to implement new initiatives to correct this. Describe the expected duration, possible two years post implementation>

# Benefit Profiles

### <Insert one table per benefit. REPEAT AS NEEDED!

See 2 style examples below>

Benefits Profile - Style 1

### <Insert one table per benefit. REPEAT AS NEEDED!>

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **<Benefit Title>** | | | | |
| Unique Number: Bnft-0X | | | Benefit Owner: | |
| Benefit Overview: |  | | | |
| Benefit Source  /Documentation  (Optional) | *<Location of the justification for the benefit. May include CM record, SharePoint link, or artefact such as the Business case or link to strategic action item/initiative>* | | | |
| Current driver business problems: |  | | | |
| Enabling functionality:  (capability created or delivered item) | |  | | |
| Benefit Audience | |  | | |
| Benefit Class (Tangible, Intangible) | |  | | |
| Benefit Type: (Business, Technology, Organisation, People and Process – BTOPP) | |  | | |
| Processes to stop | |  | | |
| How will this be measured, source of information and frequency | |  | | |
| Baseline measurement and date | |  | | **Date**: |
| Target performance and realisation dates | |  | | **Date**: |
| Risk potential to this benefit | |  | | |
| Risk mitigation | |  | | |
| Status update and date | |  | | |

Benefits Profile - Style 2

### <Insert one table per benefit. REPEAT AS NEEDED!>

|  |  |  |
| --- | --- | --- |
| **<Benefit Title>** | | |
| Unique Number: | Benefit Owner: | |
| Benefit Overview: | | |
| Current business problems: | | |
| Solution: | | |
| Enabling functionality: | |  |

|  |  |
| --- | --- |
| Change required: (Business, Technology, Organisation, People and Process – BTOPP) |  |
| Processes to stop |  |
| Business case variation |  |
| How will this be measured, source of information and frequency |  |
| Baseline measurement and date |  |
| Target performance and realisation dates |  |
| Risk potential to this benefit |  |
| Risk mitigation |  |
| Status update and date |  |