**Document 1- Business case document template**

* + **Why is this project initiated?**

This project is initiated to address the inefficiencies in B2B sales negotiations. Sales teams often struggle with real-time deal coaching, pricing inconsistencies, excessive discounting, and lack of competitive insights. *Negotiation Nexus* aims to provide real-time negotiation intelligence to help sales professionals close deals effectively, reduce revenue leakage, and improve win rates.

* + **What are the current problems?**
	+ Lack of Standardized Negotiation Frameworks – Sales teams rely on inconsistent approaches, leading to unpredictable outcomes.
	+ Pricing & Discounting Challenges – Unstructured pricing strategies cause revenue leakage and margin reduction.
	+ Limited Competitive Intelligence – Sales reps lack real-time data on competitor strategies.
	+ No Data-Driven Insights on Win/Loss Trends – Sales teams struggle to analyze why deals are lost.
	+ Fragmented Sales Data – No centralized system to track deal performance and negotiation strategies.
	+ **With this project how many problems could be solved?**

This project directly addresses at least five major sales negotiation challenges:

* + Structured Deal Coaching – Sales reps receive negotiation guidance based on best practices.
	+ Pricing & Discounting Guardrails – Ensures structured pricing strategies to protect margins.
	+ Competitor Intelligence Dashboard – Enables better positioning against rivals.
	+ Win/Loss Analysis – Helps identify trends and optimize sales strategies.
	+ Real-Time Reporting & Dashboards – Provides sales teams with actionable insights.
	+ **What are the resources required?**

To develop *Negotiation Nexus*, the following resources are needed:

* **Technology Team** – Developers, UI/UX Designers, Data Engineers.
* **Sales Strategy Team** – Sales Consultants, Negotiation Experts.
* **Infrastructure** – Cloud hosting, analytics tools, AI/ML capabilities.
* **Financial Investment** – INR **21.1 Crore** budget (as per breakdown).
* **Testing & Deployment Team** – QA and Support
	+ How much organizational change is required to adopt this technology?
* Moderate Change – Sales teams need to integrate structured negotiation strategies into their workflow.
* Training Programs – Reps and managers must familiarize themselves with new dashboards and insights.
* Process Alignment – Pricing and discounting rules need to be incorporated into existing workflows.
* CRM Integration – The tool must fit within existing CRM systems for seamless adoption.
	+ Time frame to recover ROI?

Estimated ROI Recovery: 18-24 months

* Improved Deal Conversions – Better negotiation strategies lead to more successful deals.
* Revenue Protection – Pricing controls reduce revenue loss from excessive discounts.
* Operational Efficiency – Standardized processes improve overall team productivity.
* By reducing revenue leakage and increasing sales effectiveness, businesses can expect ROI within 1.5 to 2 years.
	+ How to identify Stakeholders?

**Primary Stakeholders (Direct Users)**

* **Executives & Investors** – Evaluate ROI and strategic fit within the company.
* **Sales Representatives** – End users who will follow structured negotiation frameworks.
* **Sales Managers & Directors** – Oversee deal progress and refine strategies.
* **Finance & Pricing Teams** – Ensure pricing controls align with revenue goals.

**Secondary Stakeholders (Implementation & Support)**

* **IT & Development Teams** – Build and maintain the platform.
* **Business Analysts** – Analyze sales data and suggest improvements.

**Document 2: BA Strategy**

****

* **Elicitation Techniques to Apply**

Since Negotiation Nexus is a B2B sales negotiation tool, elicitation should focus on understanding pain points, workflow gaps, and expectations of sales professionals and business leaders.

Stakeholder Interviews – Talk to sales managers, account executives, and decision-makers to identify negotiation challenges.

Workshops & Focus Groups – Conduct discussions with sales teams to refine solution features.

Surveys & Questionnaires – Collect quantitative data from sales professionals on common negotiation hurdles.

Document Analysis – Review existing sales playbooks, CRM reports, and training materials to understand negotiation workflows.

Prototyping & Wireframes – Create mockups of the Negotiation Nexus interface for stakeholder feedback.

1. **Stakeholder Analysis**

Key Stakeholders:

1. Business Analyst (BA) – Documents requirements, bridges business and tech teams.
2. Project Manager (PM) – Oversees timelines, budgets, and coordination.
3. Product Owner (PO) – Defines product vision, ensures alignment with business needs.
4. Development Team – Builds the application.
5. QA Team – Tests features and ensures system stability.
6. Sales Team (SMEs) – Provides insights on real-world sales negotiations.
7. IT/Infrastructure Team – Ensures security, hosting, and data management.
8. Compliance/Legal – Ensures regulatory compliance.
9. Executive Sponsors – Provide funding and make key business decisions.
10. End Users (Sales Reps, Managers) – Will use the tool in live negotiations.

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Task / Activity** | **BA** | **PM** | **PO** | **Dev Team** | **QA Team** | **Sales SMEs** | **IT Team** | **Compliance** | **Exec Sponsors** | **End Users** |
| Project Initiation & Planning | R | A | C | I | I | C | I | I | A | I |
| Requirement Gathering & Analysis | R | C | A | I | I | C | I | C | I | C |
| Business Requirements Documentation (BRD) | R | C | A | I | I | C | I | C | A | I |
| Functional & Non-Functional Requirements | R | C | A | C | I | C | C | C | A | I |
| System Design & Architecture | I | C | C | A | I | I | R | C | I | I |
| Development & Coding | I | C | I | A | I | I | C | C | I | I |
| Testing & QA | I | C | C | C | A | C | I | C | I | I |
| User Training & Documentation | R | C | C | I | C | A | I | I | I | R |
| UAT (User Acceptance Testing) | C | C | A | C | R | C | I | C | I | A |
| Go-Live & Deployment | I | C | C | A | C | C | R | C | A | I |
| Post-Implementation Support | I | C | C | A | C | C | C | C | I | R |

1. **Documents to Write**

1.Requirements Analysis Phase:

Business Requirements Document (BRD)- Defines business goals, objectives, and high-level needs.

Software Requirements Specification (SRS) - Detailed functional and non-functional requirements.

Stakeholder Register - Identifies key stakeholders, roles, and responsibilities.

Use Case Document - Describes how users will interact with the system.

Feasibility Study Report - Evaluates technical, operational, and financial feasibility.

Risk Assessment Document - Identifies potential risks and mitigation plans.

2. System Design Phase

Documents:

System Design Document (SDD) - High-level and low-level design, including system architecture.

Database Design Document (DDD) - Schema, tables, relationships, and indexing strategy.

UI/UX Wireframes & Prototypes - Visual representation of the application interface.

Integration Design Document - Defines API interactions and third-party integrations.

Security & Compliance Plan - Details encryption, authentication, and data security measures.

3. Implementation Phase

Documents:

Source Code Documentation - Includes coding standards, module descriptions, and dependencies.

Test Data & Scripts - Prepared test cases for unit and integration testing.

Deployment Plan - Defines environment setup, deployment steps, and rollback strategy.

4. Testing Phase

Documents:

Test Plan - Outlines testing strategy, tools, and objectives.

Test Cases & Test Scenarios - Detailed steps for testing different functionalities.

Defect Tracking Report - Lists all identified issues with severity levels.

User Acceptance Testing (UAT) Document - Checklist for stakeholders to validate system readiness.

5. Deployment Phase

Documents:

Release Notes - Summarizes new features, improvements, and known issues.

Installation & Configuration Guide - Instructions for setting up the system in production.

End-User Manual - Explains system usage for end users.

1. Process to Follow for Sign-Off on Documents
* Draft the Document
* Review with SMEs
* Get Stakeholder Approval
* Finalize and Sign Off

**5. Taking Approvals from the Client**

As the client is internal executives, present the business case. Hold internal presentations and demos.

Stakeholder-sign off from sales team and leadership.

Showcase progress at each milestone and conduct Demos and walkthroughs where applicable.

1. **Communication Channels to Establish & Implement**
* Weekly Update Meetings – Progress tracking with key stakeholders.
* Slack/Teams Channels – Real-time updates for internal teams.
* JIRA/Confluence – Track tasks and document project details.
* Email Reports – Summarized updates for business leaders.

**7. Handling Change Requests**

Change Request Submission – Formal CRF (Change Request Form).
 Impact Assessment – Evaluate changes for cost, timeline, and feasibility.
 Approval Process – Prioritize high-impact changes with stakeholder buy-in.
 Implementation & Retesting – Ensure seamless deployment of changes.

**8. Updating Project Progress to Stakeholders**

**Project Dashboards** – Live KPI tracking for project progress.
**Weekly Status Reports** – Updates on milestones and roadblocks.
**Stakeholder Meetings** – Regular discussions to ensure alignment.

**9. Taking Sign-Off on UAT (Client Project Acceptance Form)**

User Acceptance Testing (UAT) – Conduct real-world testing with sales teams.
Defect Logging & Resolution – Track and fix issues before final deployment.
Final Sign-Off from Business Leaders – Approve system for company-wide use.

|  |  |
| --- | --- |
| Project name | Nexus Negotiation |
| Customer name | White Globe |
| Project Version | 1 |
| Project Sponsor | White Globe |
| Project Manager | Aditi Gupta |
| Project Initiation date | 28-Mar-25 |

**Functional Requirement specifications:**

|  |  |  |  |
| --- | --- | --- | --- |
| **Req ID** | **Req Name** | **Req Description** | **Priority** |
| FR0001 | User Authentication | Users should be able to register and log in using a secure authentication mechanism. | 10 |
| FR0002 | Role-Based Access Control | System should allow role-based permissions for Sales Reps, Managers, and Admins. | 9 |
| FR0003 | Real-Time Deal Coaching | The system should provide real-time negotiation insights based on predefined strategies. | 10 |
| FR0004 | Competitor Intelligence Dashboard | Users should be able to input, update, and compare competitor information. | 8 |
| FR0005 | Pricing & Discount Guardrails | System should enforce predefined pricing rules and discount limits to prevent revenue leakage. | 9 |
| FR0006 | Negotiation Playbooks | The system should provide predefined and customizable negotiation playbooks for different deal scenarios. | 8 |
| FR0007 | Win/Loss Analysis | The system should track and categorize closed deals as 'Won' or 'Lost' and generate reports. | 7 |
| FR0008 | Sales Performance Reporting | The system should generate reports on individual and team sales performance. | 9 |
| FR0009 | Real-Time Dashboards | Executives should have access to real-time dashboards with key deal metrics. | 10 |
| FR0010 | Audit Trail & Compliance | The system should maintain a log of all changes to pricing, discounts, and deal terms for compliance. | 8 |

**Document 4- Requirement Traceability Matrix**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Req ID** | **Req Name** | **Req Description** | **Design** | **D1** | **T1** | **D2** | **T2** | **UAT** |
| FR0001 | User Authentication | User must be able to log in securely to the application. | Yes | Pending | No | Yes | Yes | YES |
| FR0002 | Role-Based Access | The system should allow different roles with specific permissions. | Yes | Yes | No | Yes | Yes | YES |
| FR0003 | Real-Time Deal Coaching | System should provide real-time insights during negotiations. | Yes | Pending | No | Yes | Yes | YES |
| FR0004 | Competitor Intelligence | Users should input and compare competitor data. | Yes | No | No | Yes | No | YES |
| FR0005 | Pricing & Discount Rules | Enforce predefined pricing rules and discount limits. | Yes | Yes | Yes | Yes | No | YES |
| FR0006 | Negotiation Playbooks | Provide predefined and customizable negotiation playbooks. | Yes | Pending | No | Yes | Yes | YES |
| FR0007 | Win/Loss Analysis | Track and categorize deals based on outcomes. | Yes | Yes | No | Yes | No | YES |
| FR0008 | Sales Performance Reporting | Generate reports on sales performance. | Yes | Pending | No | Yes | Yes | YES |
| FR0009 | Real-Time Dashboards | Executives should see real-time deal metrics. | Yes | No | No | Yes | Yes | YES |
| FR0010 | Audit Trail & Compliance | Maintain a log of changes for compliance. | Yes | Yes | Yes | Yes | No | YES |

**Document 5- BRD Template**

**<Project Name >**

**<Project ID>**

**<Version ID>**

**<Author>**

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|  |  |  |
| --- | --- | --- |
| **Date** | **Version Number** | **Document Changes** |
| 05/02/20xx | 0.1 | Initial Draft |
| 28/03/2025 | 2.0 | Final Draft |
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1. Approvals

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Role** | **Name** | **Title** | **Signature** | **Date** |
| Project Sponsor |  |  |  |  |
| Business Owner |  |  |  |  |
| Project Manager |  |  |  |  |
| System Architect |  |  |  |  |
| Development Lead |  |  |  |  |
| User Experience Lead |  |  |  |  |
| Quality Lead |  |  |  |  |
| Content Lead |  |  |  |  |

1. RACI Chart for This Document

The RACI chart identifies the persons who need to be contacted whenever changes are made to this document. RACI stands for responsible, accountable, consulted, and informed. These are the main codes that appear in a RACI chart, used here to describe the roles played by team members and stakeholders in the production of the BRD. They are adapted from charts used to assign roles and responsibilities during a project.( RACI Can be made for IT side[Project stakeholder] as mentioned above, apart from that Can also Be made for Client side[Business Stakeholder]).

The following describes the full list of codes used in the table:

Codes Used in RACI Chart

\* Authorize Has ultimate signing authority for any changes to the document.

1. Responsible Responsible for creating this document.

A Accountable Accountable for accuracy of this document (for example, the project manager)

1. Supports Provides supporting services in the production of this document

|  |  |  |
| --- | --- | --- |
| C | Consulted | Provides input (such as an interviewee). |
| I | Informed | Must be informed of any changes. |

RACI Chart

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Task / Activity** | **BA** | **PM** | **PO** | **Dev Team** | **QA Team** | **Sales SMEs** | **IT Team** | **Compliance** | **Exec Sponsors** | **End Users** |
| Project Initiation & Planning | R | A | C | I | I | C | I | I | A | I |
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| Functional & Non-Functional Requirements | R | C | A | C | I | C | C | C | A | I |
| System Design & Architecture | I | C | C | A | I | I | R | C | I | I |
| Development & Coding | I | C | I | A | I | I | C | C | I | I |
| Testing & QA | I | C | C | C | A | C | I | C | I | I |
| User Training & Documentation | R | C | C | I | C | A | I | I | I | R |
| UAT (User Acceptance Testing) | C | C | A | C | R | C | I | C | I | A |
| Go-Live & Deployment | I | C | C | A | C | C | R | C | A | I |
| Post-Implementation Support | I | C | C | A | C | C | C | C | I | R |

1. Introduction
	1. Business Goals

[This should describe the organization goals& Organization Need]

The primary goal of the **Negotiation Nexus** project is to empower sales professionals with structured negotiation strategies and insights, enabling them to close deals more effectively. This aligns with the organization’s objective of improving sales efficiency, enhancing deal closure rates, and increasing revenue generation.

* 1. Business Objectives

The **Negotiation Nexus** project aims to develop an IT solution that enhances sales negotiations by providing structured tools and insights. The key functionalities to be developed in the software include:

1. **User Authentication & Role-Based Access Control** – Ensuring secure login and access permissions based on user roles (Sales Representative, Manager, Admin).
2. **Deal Management Module** – Allowing users to create, track, and manage ongoing negotiations and deals.
3. **Negotiation Playbook** – Providing pre-defined strategies and templates based on best negotiation practices.
4. **Real-Time Collaboration** – Enabling teams to collaborate on deals via in-app chat or comments.
5. **Approval Workflow** – Implementing a structured approval process for high-value deals before closure.
6. **Historical Deal Insights & Analytics** – Offering data-driven insights from past negotiations for better decision-making.
7. **Competitor & Market Analysis** – Providing comparative insights on competitors to strengthen negotiation positioning.
8. **Automated Reminders & Follow-Ups** – Ensuring timely communication with prospects through scheduled reminders.
9. **Integration with CRM Systems** – Syncing deal information with existing CRM platforms (e.g., Salesforce, HubSpot).
10. **Reporting & Performance Dashboards** – Allowing sales managers to track negotiation success rates and individual performance metrics.
	1. Business Rules

[List Organization Policies, Procedures, and Rules& Regulations]

The Negotiation Nexus project must adhere to the following organizational policies, procedures, and rules:

1. User Access & Security

Only authorized users can access the system, with role-based access controls.

Sales representatives can only view and edit their own deals, while managers can oversee team negotiations.

Admins have full system control, including user management and data access.

All data must be encrypted in transit and at rest to maintain confidentiality.

2. Deal Management & Approval

Deals above a pre-defined value threshold require managerial approval before finalization.

Discounts and pricing adjustments must align with predefined company guidelines.

Any deviation from the standard negotiation playbook requires justification and approval.

All negotiations must be logged for compliance and audit purposes.

3. Compliance & Regulatory Adherence

The system must comply with GDPR and local data privacy laws for customer information handling.

All stored information should follow the company’s data retention policy (e.g., deal records must be retained for five years).

Any changes to pricing or contracts must align with legal and finance team policies.

4. Reporting & Performance Monitoring

Sales performance reports should be generated monthly and accessible to management.

Competitor intelligence dashboards should be updated in real-time to reflect market changes.

The system must generate alerts for negotiation deadlines to ensure timely follow-ups.

5. Integration & System Policies

The solution must integrate with the company’s existing CRM, ERP, and document management systems.

Any third-party software or API integration must be approved by the IT department.

System maintenance and updates will be scheduled outside of peak business hours to avoid disruptions.

* 1. Background

*[Provide a brief history of how the project came to be proposed and initiated, including the business issues/problems identified, and expected benefit of implementing the project/developing the product.]*

Sales professionals struggle with **real-time negotiation insights**, lack of structured deal coaching, and **inefficient pricing strategies**, leading to **lost opportunities and revenue leakage**.

**Identified Business Issues & Problems**

1. **Inconsistent Sales Negotiations** – Sales teams rely on **ad-hoc negotiation tactics**, leading to inconsistent deal outcomes.
2. **Lack of Real-time Coaching** – Managers are unable to provide timely guidance to sales reps during active negotiations.
3. **Limited Competitive Intelligence** – Sales teams lack **real-time insights** into competitors' pricing and deal structures.
4. **Pricing & Discounting Challenges** – No standardized **pricing guardrails**, leading to revenue loss from **over-discounting**.
5. **Manual & Inefficient Processes** – Sales data, approvals, and negotiation playbooks are **scattered across multiple systems**, making deal closures slow.

**Expected Benefits of Negotiation Nexus**

The **Negotiation Nexus** project aims to **streamline and optimize sales negotiations** through a structured, technology-driven approach. By implementing this solution, organizations can:
**1. Standardize negotiation strategies** through predefined **dynamic playbooks**.
**2. Improve deal success rates** with real-time **coaching and AI-driven insights**.
**3. Enhance pricing discipline** using **discounting guardrails and approval workflows**.
**4. Empower sales teams** with competitive intelligence dashboards for better decision-making.
**5. Increase efficiency** by integrating with CRM and automating key processes.

By addressing these challenges, **Negotiation Nexus** will improve **deal conversion rates, boost revenue, and enable sales teams to negotiate with confidence**.

* 1. Project Objective

[*These should describe the overall goal in developing the product, high level descriptions of what the product will do, how they are aligned to business objectives, and the requirements for interaction with other systems*]

The Negotiation Nexus project aims to develop a comprehensive IT solution that empowers sales teams to drive more effective negotiations, optimize pricing strategies, and improve deal outcomes. The system will provide structured negotiation guidance, real-time coaching, and competitive intelligence to support B2B sales professionals in closing deals efficiently.

**High-Level Objectives:**

* Enable Sales Teams with Real-Time Negotiation Support
* Develop a real-time deal coaching assistant to provide contextual guidance during negotiations.
* Optimize Pricing and Discounting Strategies
* Introduce pricing guardrails to prevent revenue loss from excessive discounting.
* Establish automated approval workflows for high-risk deals.
* Enhance Competitor Intelligence & Data-Driven Decision Making
* Build a competitor intelligence dashboard for sales reps to analyze market trends.
* Provide historical win/loss insights to refine negotiation strategies.
* Improve Business Efficiency and CRM Integration
* Ensure seamless integration with existing CRM systems (e.g., Salesforce, HubSpot).
* Automate reporting and analytics to track negotiation performance and identify improvement areas.

**Alignment with Business Objectives:**

* Increase Deal Win Rates: By equipping sales teams with structured negotiation playbooks.
* Reduce Revenue Leakage: By enforcing pricing discipline and approval mechanisms.
* Improve Sales Productivity: By automating manual processes and data tracking.
* Enhance Strategic Decision-Making: Through data-driven insights and competitive intelligence.

**Integration with Other Systems:**

* Customer Relationship Management (CRM): Pull customer and deal-related data for a holistic view.
* ERP & Finance Systems: Ensure alignment with financial policies and revenue targets.
* Reporting & Analytics Platforms: Generate dashboards to track negotiation performance.
	1. Project Scope

[What we are going to develop in the current project]

The Negotiation Nexus project will develop a B2B negotiation management platform designed to assist sales professionals in optimizing deal closures, enforcing pricing discipline, and providing competitive insights. The platform will provide structured negotiation guidance, real-time analytics, and workflow automation to help sales teams navigate complex deal-making scenarios.

* + 1. In Scope Functionality

[List what functionalities we are going to do with in the project in bullets]

* Real-Time Deal Coaching Assistant
* Context-based negotiation recommendations.
* Structured negotiation playbooks to guide sales teams.
* Integration with CRM for deal-specific insights.
* Competitor Intelligence Dashboard
* Analysis of market trends and competitor strategies.
* Visualization of historical sales performance vs. competitors.
* Alerts on key competitive pricing moves.
* Pricing and Discounting Guardrails
* Automated pricing validation based on pre-set rules.
* Approval workflows for high-discount deals.
* Dashboard for tracking pricing compliance.
* Dynamic Negotiation Playbooks
* Customizable playbooks based on deal size, industry, and competition.
* Scenario-based recommendations for optimal negotiation tactics.
* Integration with sales training resources.
* Win/Loss Analysis & Performance Reporting
* Data-driven insights on why deals are won or lost.
* Automated reports on negotiation effectiveness.
* KPI tracking for deal success rates.
* Real-Time Sales Dashboards & Benchmarking
* Interactive dashboards for deal tracking and approvals.
* Performance benchmarking against successful negotiations.
* Reports to identify gaps in negotiation strategies.
	+ 1. Out of Scope Functionality

[List of functionality what is not included in the current project]

* AI-driven recommendations (since the project is set in 2022, before AI adoption).
* Integration with external pricing algorithms (custom rule-based logic will be used instead).
* Mobile application development (web-based only in this phase).
* Custom-built CRM solutions (integration with existing CRMs only).
* Automated chatbot assistants
1. Assumptions

[List all assumptions requirements are based on]

**User Adoption**

* Sales professionals and managers will be trained to use the platform effectively.
* Users will be willing to transition from existing manual negotiation processes to the new system.

**Technical Infrastructure**

* The organization has the necessary hardware and network infrastructure to support the platform.
* The platform will be a web-based solution accessible via standard browsers.

**CRM Integration**

* The system will integrate with existing CRM platforms (e.g., Salesforce, HubSpot).
* APIs and data access from CRM providers will be available.

**Security & Compliance**

* The system will adhere to industry-standard security protocols.
* Compliance with data protection regulations (e.g., GDPR, SOC2) will be ensured.

**Data Availability**

* Historical sales data will be available for win/loss analysis.
* Competitive intelligence data sources will be accessible for benchmarking.

**Business Process Alignment**

* The solution will align with existing sales and approval workflows.
* No major organizational restructuring will be required for adoption.

**Budget & Timeline**

* The project will be completed within the approved budget and timeframe.
* No significant scope creep will occur during development.
1. Constraints

[List all Constraints]

**Budget Limitations**

* The project must be completed within the allocated **₹2.12 crore budget**.
* No additional funding will be available beyond the approved financial scope.

**Fixed Timeline**

* The project must follow a **Waterfall development model**, requiring sequential phases.
* The expected delivery timeline is **6-8 months**, with no flexibility for major delays.

**Technology Stack**

* The system will be developed using **pre-approved technologies** (e.g., SQL Server, .NET, JavaScript).

**Integration Limitations**

* The platform must integrate with **existing CRM and ERP systems**.
* Limited control over **third-party API availability and updates**.

**User Access & Permissions**

* The system will have **role-based access controls**, restricting certain users from modifying key negotiation data.
* Only authorized users (e.g., sales managers, executives) can override pricing guardrails.

**Regulatory Compliance**

* The solution must comply with **industry-specific regulations** (e.g., GDPR, SOC2, local data protection laws).
* All data will be stored and processed **within approved geographic regions**.

**Change Management**

* Organizational change will be **gradual**, with training programs to support adoption.
* No drastic changes to existing **sales processes** will be implemented in the first release.
1. Risks

In this section of the BRD, you describe risks. A *risk* is something that could affect the success or failure of a project. Analyze risks regularly as the project progresses. While you may not be able to avoid every risk, you can limit each risk’s impact on the project by preparing for it beforehand. For each risk, you’ll note the likelihood of its occurrence, the cost to the project if it does occur, and the strategy for handling the risk. Strategies include the following:

* **Avoid:** Do something to eliminate the risk.
* **Mitigate:** Do something to reduce damage if risk materializes.
* **Transfer:** Pass the risk up or out to another entity.
* **Accept:** Do nothing about the risk. Accept the consequences. Technological Risks

This subsection of “Risk Analysis” specifies new technology issues that could affect the project.

Skills Risks

This subsection of “Risk Analysis” specifies the risk of not getting staff with the required expertise for the project.

Political Risks

This subsection of “Risk Analysis” identifies political forces that could derail or affect the project.

Business Risks

This subsection of “Risk Analysis” describes the business implications if the project is canceled.

Requirements Risks

This subsection of “Risk Analysis” describes the risk that you have not correctly described the requirements. List areas whose requirements were most likely to have been incorrectly captured.

Other Risks

In this subsection of “Risk Analysis,” document any other risks not covered in the prior subsections.

**7.1. Technological Risks**

* **Risk:** Integration challenges with existing CRM and ERP systems.
	+ *Likelihood:* Medium
	+ *Impact:* High (delays in deployment, additional development costs)
	+ *Mitigation:* Conduct compatibility testing early, allocate buffer time for API modifications.
* **Risk:** Data security vulnerabilities leading to potential breaches.
	+ *Likelihood:* Low
	+ *Impact:* High (legal issues, reputational damage)
	+ *Mitigation:* Implement encryption, access control, and regular security audits.

**7.2. Skills Risks**

* **Risk:** Lack of skilled developers or business analysts for complex negotiations logic.
	+ *Likelihood:* Medium
	+ *Impact:* Medium (delays in development)
	+ *Mitigation:* Upskill internal teams or onboard external consultants early in the project.
* **Risk:** Lack of proper training for end-users leading to poor adoption.
	+ *Likelihood:* High
	+ *Impact:* High (reduced ROI)
	+ *Mitigation:* Develop structured training programs, conduct pilot sessions.

**7.3. Political Risks**

* **Risk:** Resistance from sales teams due to changes in existing workflows.
	+ *Likelihood:* Medium
	+ *Impact:* High (lower adoption rates)
	+ *Mitigation:* Engage stakeholders early, highlight value propositions, provide incentives for adoption.
* **Risk:** Regulatory or compliance changes affecting pricing and negotiation rules.
	+ *Likelihood:* Low
	+ *Impact:* Medium (project modifications required)
	+ *Mitigation:* Regular legal review, compliance audits.

**7.4. Business Risks**

* **Risk:** Project cancellation due to budget constraints or shifting priorities.
	+ *Likelihood:* Medium
	+ *Impact:* High (financial and resource losses)
	+ *Mitigation:* Demonstrate ROI early through incremental releases, secure executive buy-in.
* **Risk:** Competitors releasing a similar product with better features.
	+ *Likelihood:* Medium
	+ *Impact:* High (loss of market share)
	+ *Mitigation:* Focus on **Negotiation Nexus’s** unique value proposition and continuous feature enhancements.

**7.5. Requirements Risks**

* **Risk:** Incorrect or incomplete business requirements leading to rework.
	+ *Likelihood:* High
	+ *Impact:* High (project delays, increased costs)
	+ *Mitigation:* Conduct multiple stakeholder workshops, use **prototypes** for validation.
* **Risk:** Scope creep due to frequent change requests.
	+ *Likelihood:* Medium
	+ *Impact:* High (missed deadlines, cost overruns)
	+ *Mitigation:* Use a **strict change management process** with stakeholder approval checkpoints.

**7.6. Other Risks**

1. **Risk:** Vendor dependency for infrastructure & hosting.
	* *Likelihood:* Low
	* *Impact:* Medium (delays if the vendor fails to deliver)
	* *Mitigation:* Have contingency plans, negotiate SLAs with vendors.
2. Business Process Overview

[This describes the overall process flow from each phase]

* 1. Legacy System (AS-IS)

[Brief Explanation about the process in legacy system and draw process flow diagrams]

* 1. Proposed Recommendations (TO-BE)

[Describe the recommended process and how the proposed system will address the challenges in legacy system]

**8.1. Legacy System (AS-IS)**

Current Issues:

The negotiation process is highly manual, relying on emails, spreadsheets, and phone calls.

Lack of centralized data—pricing approvals, discount justifications, and deal history are scattered across multiple platforms.

Inconsistent deal coaching—sales representatives rely on ad-hoc guidance, leading to varied outcomes.

No real-time tracking of negotiation insights, leading to missed opportunities and suboptimal deal closures.

Long approval cycles due to multiple email-based approvals, delaying deal closures.

Legacy System Process Flow (AS-IS)

* 1. Sales rep receives a prospect inquiry.

2️. Manually gathers past deal data from multiple sources.

3️. Drafts a proposal and shares it with the sales manager via email.

4️. Sales manager reviews, suggests changes, and forwards to finance for pricing approvals.

5️. Finance takes time to evaluate profitability, sometimes causing delays.

6️. Legal reviews terms, further extending negotiation timelines.

7️. Customer waits for responses, increasing the risk of losing the deal.

Challenges:

1. Slow turnaround time for negotiations.
2. No visibility into real-time progress.
3. No structured deal coaching available to optimize negotiation tactics.
4. Prone to data errors and missed approvals due to reliance on emails and spreadsheets.

**8.2. Proposed Recommendations (TO-BE)**

The **Negotiation Nexus** solution introduces an automated, structured negotiation workflow, ensuring efficiency, transparency, and better deal closures.

**Key Enhancements:**

**Centralized Deal Management System:** All deal-related data is stored in one platform, reducing inefficiencies.
**Real-Time Pricing & Approval Workflows:** Automated approval routing for faster responses.
**Deal Coaching & Insights:** AI-free analytics to suggest optimal negotiation tactics based on historical success.
**Enhanced Collaboration:** In-platform chat & document sharing for faster communication.

**Proposed System Process Flow (TO-BE)**

1. Sales rep logs into **Negotiation Nexus** and enters deal details.
2. The system retrieves relevant past deal data automatically.
3. The sales manager receives an alert for review and provides instant feedback.
4. Finance is notified via an automated approval workflow.
5. Legal team can directly access deal terms and approve with one click.
6. The system provides **real-time negotiation insights** to refine deal terms.
7. The customer receives the final proposal much faster, increasing the chance of closure.

**Benefits:**

* **Faster negotiations** due to streamlined workflows.
* **Better deal outcomes** with structured deal coaching.
* **Higher conversion rates** with real-time insights.
* **Reduced manual effort**, allowing the sales team to focus on selling.
1. Business Requirements

[The specific business requirements elicited from stakeholders should be listed, categorized by both priority and area of functionality to smooth the process of reading and tracking them. Include links to use case documentation, and other key reference material as needed to make the requirements as complete and understandable as possible. You may wish to incorporate the functional and non- functional requirements into a traceability matrix that can be followed throughout the project]

Functional Business Requirements

|  |  |  |  |
| --- | --- | --- | --- |
| **ID** | **Requirement Description** | **Priority (High/Med/Low)** | **Category** |
| BR-01 | The system must allow sales representatives to input deal details, including customer name, deal size, and proposed pricing. | High | Data Entry & Management |
| BR-02 | The system should fetch relevant historical deal data and pricing trends automatically. | High | Data Retrieval & Insights |
| BR-03 | Automated approval workflows should notify sales managers and finance teams for pricing approvals. | High | Workflow Automation |
| BR-04 | The system must allow real-time deal coaching based on past successful negotiation patterns. | Medium | Sales Optimization |
| BR-05 | Sales reps should be able to collaborate with finance and legal teams within the platform. | High | Collaboration & Communication |
| BR-06 | The system must ensure deal tracking with status updates visible to all stakeholders. | High | Deal Management |
| BR-07 | The platform should provide a report dashboard with negotiation success rates, approval turnaround times, and discount analysis. | Medium | Reporting & Analytics |
| BR-08 | The system should generate a final negotiation summary document for approval and signature. | High | Document Management |
| BR-09 | All deal-related communications should be logged for audit and compliance. | High | Compliance & Security |
| BR-10 | The platform should support role-based access to ensure only authorized personnel can view/edit deal information. | High | Security & Access Control |

9.3. Non-Functional Business Requirements

|  |  |  |  |
| --- | --- | --- | --- |
| **ID** | **Requirement Description** | **Priority (High/Med/Low)** | **Category** |
| NFR-01 | The system should handle up to 500 concurrent users without performance degradation. | High | Scalability & Performance |
| NFR-02 | System uptime must be 99.9% to ensure accessibility for global sales teams. | High | Reliability |
| NFR-03 | All user actions must be logged and stored for a minimum of 2 years for audit purposes. | High | Compliance |
| NFR-04 | The platform should be accessible via web and mobile devices. | Medium | Usability |
| NFR-05 | The system should encrypt all deal-related data in transit and at rest. | High | Security |
| NFR-06 | Users should be able to export deal summaries into Excel and PDF formats. | Medium | Data Export |

**Requirement Traceability Matrix (RTM)**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Req ID** | **Business Requirement** | **FR ID** | **Functional Requirement** | **Design Specification ID** | **Test Case ID** | **Status** |
| BR-01 | Capture deal details | FR-01 | The system must allow sales reps to input deal details. | DS-01 | TC-01 | Pending |
| BR-02 | Fetch historical deal data | FR-02 | The system should fetch historical deal data and pricing trends. | DS-02 | TC-02 | Pending |
| BR-03 | Automate approval workflows | FR-03 | Automated approval workflows notify sales managers and finance. | DS-03 | TC-03 | In Progress |
| BR-04 | Provide deal coaching | FR-04 | The system must allow real-time deal coaching based on past successful negotiation patterns. | DS-04 | TC-04 | Pending |
| BR-05 | Enable collaboration | FR-05 | Sales reps should be able to collaborate with finance and legal teams. | DS-05 | TC-05 | Pending |
| BR-06 | Deal tracking | FR-06 | The system must ensure deal tracking with real-time updates. | DS-06 | TC-06 | In Progress |
| BR-07 | Reporting dashboard | FR-07 | The platform should provide reports on negotiation success rates and discounts. | DS-07 | TC-07 | Not Started |
| BR-08 | Generate final negotiation summary | FR-08 | The system should generate a negotiation summary for approval. | DS-08 | TC-08 | In Progress |
| BR-09 | Compliance & audit logs | FR-09 | All deal-related communications must be logged for audit. | DS-09 | TC-09 | Completed |
| BR-10 | Role-based access control | FR-10 | The platform must support role-based access for security. | DS-10 | TC-10 | Completed |

**Non-Functional Requirements (NFRs)**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Req ID** | **Non-Functional Requirement** | **Design Specification ID** | **Test Case ID** | **Status** |
| NFR-01 | Support 500 concurrent users | DS-11 | TC-11 | Pending |
| NFR-02 | 99.9% uptime | DS-12 | TC-12 | In Progress |
| NFR-03 | Audit logs for 2 years | DS-13 | TC-13 | Completed |
| NFR-04 | Web and mobile accessibility | DS-14 | TC-14 | Pending |
| NFR-05 | Data encryption in transit & at rest | DS-15 | TC-15 | Completed |
| NFR-06 | Export data in Excel & PDF | DS-16 | TC-16 | Not Started |

1. Appendices
	1. List of Acronyms

|  |  |
| --- | --- |
| **Acronym** | **Full Form** |
| BRD | Business Requirements Document |
| RTM | Requirement Traceability Matrix |
| SME | Subject Matter Expert |
| ROI | Return on Investment |
| KPI | Key Performance Indicator |
| UI | User Interface |
| UX | User Experience |
| API | Application Programming Interface |

* 1. Glossary of Terms

|  |  |
| --- | --- |
| **Term** | **Definition** |
| **Negotiation Playbook** | A structured guide for sales professionals to handle negotiations. |
| **Real-Time Deal Coaching** | Instant guidance and recommendations during sales negotiations. |
| **Stakeholder** | Any individual or group with an interest in the project. |
| **Waterfall Model** | A linear approach to project development where each phase is completed before moving to the next. |
| **Functional Requirement** | Defines what a system must do (e.g., generate reports, process transactions). |
| **Non-Functional Requirement** | Defines system attributes such as performance, security, or scalability. |

* 1. Related Documents

|  |  |
| --- | --- |
| **Document Name** | **Description** |
| **Functional Requirements Document (FRD)** | Provides detailed descriptions of system functionalities. |
| **Requirement Traceability Matrix (RTM)** | Maps requirements to project deliverables. |
| **Software Requirements Specification (SRS)** | Describes software system expectations in technical detail. |
| **Project Charter** | Outlines the project's scope, objectives, and stakeholders. |
| **Test Plan Document** | Describes how the system will be tested to ensure compliance with requirements. |