### Purpose

The purpose of the Business Requirements Document is twofold:

1. **Alignment to the Customer's Priorities:** Understand what's driving your customers from the top down. This approach makes it easier for product, marketing, sales and customer success teams to align their priorities to those of your target customers at every level of the organization instead of focusing on tactical user needs only.
2. **Deliver Guaranteed Strategic Value by Focusing on Customer Outcomes:** You'll learn a shortcut for uncovering the biggest problems of your target customers by making their business outcomes the centerpiece of your strategic, operational and tactical business requirements.

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# Vertical Industry Market Dynamics & Trends

Complete this exercise as if you're the CEO of a target customer. When describing industry trends and market dynamics, be sure to indicate the direction the trend is moving (up/down/flat).

|  |  |
| --- | --- |
| [Industry Name *e.g., Retail*] Market Dynamics & Trends Dynamics/Trends Currently Shaping This Industry | Impact to the Customer Organization Things CEOs Lose Sleep Over! |
| 1. **Example:** Online shopping continues to grow at a hyper pace. | * A different set of skills are required to create a great customer experience online vs. brick & mortar stores. |
|  |  |
|  |  |

# Strategic Business Requirements

Consider strategic business requirements to be the strategic impact of the industry trends and market dynamics on the customer organization at the highest level.

|  |  |
| --- | --- |
| Strategic Priority  An Action Item | **Example**: We (the customer)need to…create more of the in-store experience online. |
| Goal/Ideal Outcome | *More revenue per visit (online store).* |
| Biggest Obstacles | *Different skill sets required that are more difficult to find.* |
| Success Metrics | *Average revenue per online store visit.* |
|  | |
| Strategic Priority 1  A*n Action Item* | We (the customer) need to… |
| Goal/Ideal Outcome |  |
| Biggest Obstacles |  |
| Success Metrics |  |

|  |  |
| --- | --- |
|  | |
| Strategic Priority 2  An Action Item | We (the customer) need to… |
| Goal/Ideal Outcome |  |
| Biggest Obstacles |  |
| Success Metrics |  |
|  | |
| Strategic Priority 3  An Action Item | We (the customer) need to… |
| Goal/Ideal Outcome |  |
| Biggest Obstacles |  |
| Success Metrics |  |

# Horizonal Business Trends & Market Dynamics

Complete the next two sections as if you're the senior most person responsible for a department, e.g., CIO, CHRO, CFO.

|  |  |
| --- | --- |
| Horizonal Business Trends & DynamicsCustomer Department Name (e.g., HR, IT, Finance) | Impact to the Department Things Department Heads Lose Sleep Over! |
| 1. **Example (HR):** The gig economy is shrinking the workforce for lower-paying service jobs | * Can't hire/retain enough people with the necessary skills to support growth plans. |
|  |  |
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# Operational Business Requirements

Operational business requirements are the top priorities for each department based on the strategic priorities (vertical industry strategic business requirements) or the horizontal business trends (cross-industry trends).

|  |  |
| --- | --- |
| Operational Priority  *An Action Item* | **Example**: We (the customer) need to…*retool the skills of the workforce to better align with the needs and expectations of online shoppers.* |
| Goal/Ideal Outcome | *Drive the majority of our revenue from online sales.* |
| Biggest Obstacles | *Acquiring more skilled, higher paid workers to support customers in the online store.* |
| Success Metrics | *Year over year growth in online sales vs. brick & mortar.* |
|  | |
| Operational Priority 1  *An Action Item* | We (the customer) need to… |
| Goal/Ideal Outcome |  |
| Biggest Obstacles |  |
| Success Metrics |  |

|  |  |
| --- | --- |
|  | |
| Operational Priority 2  An Action Item | We (the customer) need to… |
| Goal/Ideal Outcome |  |
| Biggest Obstacles |  |
| Success Metrics |  |
|  | |
| Operational Priority 3  An Action Item | We (the customer) need to… |
| Goal/Ideal Outcome |  |
| Biggest Obstacles |  |
| Success Metrics |  |

# Tactical Business Requirements

Tactical business requirements describe the job activities that have to change as a result of the operational priorities (operational business requirements). Determine the Job Activities (Target Customer Footprint & Personas) that are impacted most by the operational priorities in the previous section.

|  |  |
| --- | --- |
| Job Task | **Example**: *Meet potential job applicants* |
| Goal/Ideal Outcome | *Consistently have a quality pipeline of job candidates (who want to work for us) with skills that align to our strategic goals.* |
| Why is the current way of doing it an issue? | *We don't meet with potential applicants before there's an opening, and it’s more difficult to convince the good ones that we’re a great place to work.* |
| What has to change **(procedurally)** to eliminate the issue? | *Allow potential applicants to meet (virtually) with existing employees so they learn more about the company and what it’s like to work in certain jobs.* |
| Success Metrics | *Percentage of applications and hires from candidates we know/have prior interactions with.* |

|  |  |
| --- | --- |
| Job Task 1 |  |
| Goal/Ideal Outcome |  |
| Why is the current way of doing it an issue? |  |
| What has to change **(procedurally)** to eliminate the issue? |  |
| Success Metrics |  |

|  |  |
| --- | --- |
| Job Task 2 |  |
| Goal/Ideal Outcome |  |
| Why is the current way of doing it an issue? |  |
| What has to change **(procedurally)** to eliminate the issue? |  |
| Success Metrics |  |

|  |  |
| --- | --- |
| Job Task 3 |  |
| Goal/Ideal Outcome |  |
| Why is the current way of doing it an issue? |  |
| What has to change **(procedurally)** to eliminate the issue? |  |
| Success Metrics |  |

# Workflows for High-Priority Job Activities

Choose one of the job tasks from the Tactical Business Requirements. Create a high-level workflow using the diagram below that illustrates the steps required to successfully complete the task, **regardless of how each step is completed** [manual, automated, etc.].

**Job Task**

**Example:** Meet prospective employees

Publish my availability

Accept a meeting request

Confirm meeting date/time

Discuss the company and role/career

Document meeting highlights / insights

Send notes to HR

Step 6a Task

Step 6b Task

Step 6c Task

Step 5a Task

Step 5b Task

Step 5c Task

Step 4a Task

Step 4b Task

Step 4c Task

Step 3a Task

Step 3b Task

Step 3c Task

Step 2a Task

Step 2b Task

Step 2c Task

Step 1a Task

Step 1b Task

Step 1c Task

# User Stories & "What-If" Scenarios

Choose one of the most problematic tasks (that you can address) from the workflow diagram and complete the following worksheet according to the instructions.

|  |  |
| --- | --- |
| **Job Task Story**  **Example** | *I want to [discuss the company and my role] so that [the prospective employee I’m meeting with can determine if it’s a good fit] without [a lot of back-and-forth messages/emails/calls to get the meeting scheduled].*  If the obstacle is a manual process, describe it instead of writing “manually.” |
| 1. Product Story | I want to **[product feature to do something]** so that **[outcome]** |
| 1. Product Story |  |
| What-if Scenario | |
| What if ***(something that doesn’t normally happen)*** occurs? *I take another job before my meeting with the prospective employee.* | |
| Product Stories | |
| 1. Product Story | I want **[product feature to do something]** so that **[outcome]** |
| 1. Product Story | I want **[product feature to do something]** so that **[outcome]** |

|  |  |
| --- | --- |
| **Job Task Story 1** | I want to **[step/task]** so that **[goal/outcome]** without **[obstacle that currently makes this task so difficult]**.  If the obstacle is a manual process, describe it instead of writing “manually.” |
| 1. Product Story | I want to **[product feature to do something]** so that **[outcome]** |
| 1. Product Story |  |
| 1. Product Story |  |
| What-if Scenario | |
| What if ***(something that doesn’t normally happen)*** occurs? | |
| Product Stories | |
| 1. Product Story | I want **[product feature to do something]** so that **[outcome]** |
| 1. Product Story | I want **[product feature to do something]** so that **[outcome]** |
| 1. Product Story | I want **[product feature to do something]** so that **[outcome]** |

|  |  |
| --- | --- |
| **Job Task Story 2** | I want to **[step/task]** so that **[goal/outcome]** without **[obstacle that currently makes this task so difficult]**.  If the obstacle is a manual process, describe it instead of writing “manually.” |
| 1. Product Story | I want to **[product feature to do something]** so that **[outcome]** |
| 1. Product Story |  |
| 1. Product Story |  |
| What-if Scenario | |
| What if ***(something that doesn’t normally happen)*** occurs? | |
| Product Stories | |
| 1. Product Story | I want **[product feature to do something]** so that **[outcome]** |
| 1. Product Story | I want **[product feature to do something]** so that **[outcome]** |
| 1. Product Story | I want **[product feature to do something]** so that **[outcome]** |

|  |  |
| --- | --- |
| **Job Task Story 3** | I want to **[step/task]** so that **[goal/outcome]** without **[obstacle that currently makes this task so difficult]**.  If the obstacle is a manual process, describe it instead of writing “manually.” |
| 1. Product Story | I want to **[product feature to do something]** so that **[outcome]** |
| 1. Product Story |  |
| 1. Product Story |  |
| What-if Scenario | |
| What if ***(something that doesn’t normally happen)*** occurs? | |
| Product Stories | |
| 1. Product Story | I want **[product feature to do something]** so that **[outcome]** |
| 1. Product Story | I want **[product feature to do something]** so that **[outcome]** |
| 1. Product Story | I want **[product feature to do something]** so that **[outcome]** |