

Manulife Financial

Business Requirements

Executive Contact Directory

Sanitized Portfolio Sample

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Confidentiality	Public / Sanitized

SANITIZATION NOTICE

This document is a portfolio sample based on the structure of historical business-analysis work. Employee names, internal teams, vendor names, proprietary identifiers, detailed infrastructure information, commercial terms, internal approval bodies and other potentially confidential content have been removed or generalized. It is not an official Manulife document and is not intended to represent current Manulife systems or requirements.

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Document Control

Version	Date	Comment
0.1	Portfolio preparation	Sanitized draft created from historical BRD structure
0.9	Review	Confidential and identifying details generalized
1.0	Final sample	Approved for public portfolio use

1. Introduction

This Business Requirements Document describes a sample initiative to modernize an executive contact directory so authorized users can securely access current contact information across approved mobile devices and enterprise channels. The sample demonstrates requirements elicitation, prioritization, scope definition, controls, availability and sign-off practices without exposing confidential project details.

1.1 Summary

Purpose	Define business requirements for a secure, maintainable executive contact directory and supporting administration process.
Audience	Business sponsor, product owner, business analysts, technology delivery, security, operations and quality assurance.
Author	Oksana Lisovska
Portfolio Note	All names, systems, vendors and internal identifiers have been removed or generalized for public presentation.

1.2 Revision History

Version	Date	By	Comments
0.1	Portfolio draft	Oksana Lisovska	Initial sanitized sample
1.0	Final	Oksana Lisovska	Public portfolio version

2. Overview

2.1 Requirement Description

The initiative provides a secure and user-friendly way to maintain and distribute executive contact information to a limited authorized audience using approved enterprise devices. The solution must support ongoing updates without requiring complex technical intervention and must protect sensitive contact information through appropriate access controls.

2.2 MoSCoW Prioritization

Requirements are prioritized using the MoSCoW method:

- M - MUST have
- S - SHOULD have
- C - COULD have
- W - WOULD like to have / future consideration

2.3 Objectives

- Maintain accurate executive contact data through a controlled administrative process.
- Make approved contact data available across supported enterprise mobile channels.
- Enable authorized users to search, call and email contacts using current information.
- Provide reliable synchronization and recovery while protecting data confidentiality.
- Reduce manual re-entry and improve consistency between the source directory and end-user devices.

2.4 In Scope

- Approved mobile phones and tablets
- Central administration interface for contact maintenance
- Search and basic contact actions
- Controlled synchronization of approved directory data
- Security, auditability, backup and recovery requirements

2.5 Out of Scope

- Enterprise-wide employee directory replacement
- Personal email or calendar synchronization
- Unapproved consumer devices
- Changes to unrelated HR or identity-management platforms
- Disclosure of actual executive contact information in this portfolio sample

2.6 Dependencies & Constraints

- Availability of an approved enterprise mobile platform
- Identity and access-management integration
- Security and privacy review before production release
- Limited authorized user population
- Solution must follow enterprise change-management and release processes

3. Business Requirements

The following sample requirements demonstrate the expected level of clarity, traceability and priority assignment in a Business Requirements Document.

ID	Business Requirement	Priority	Rationale
BR-001	The system must support access from approved enterprise mobile-device categories.	M	Core capability
BR-002	The system must provide an administrator interface for creating, updating and deactivating contact records.	M	Core capability
BR-003	The system must support search by name, role, business area and location where those attributes are available.	M	Core capability
BR-004	The system must allow an authorized administrator to update contact information without software deployment.	M	Core capability
BR-005	The system must synchronize approved changes to end-user devices within the defined service window.	M	Core capability
BR-006	The system must maintain controls that reduce the risk of unauthorized or inadvertent modification and deletion.	M	Core capability
BR-007	The system must maintain a recoverable version of directory data to support restoration following an operational error.	M	Core capability
BR-008	The system should support multiple business and mailing addresses for a contact.	S	User experience / efficiency
BR-009	The solution should provide a consistent user experience across supported device	S	User experience / efficiency

ID	Business Requirement	Priority	Rationale
	categories.		
BR-010	The solution must encrypt data in transit and apply role-based access control to administrative functions.	M	Core capability
BR-011	The system must record an audit trail for create, update and deactivate actions performed by administrators.	M	Core capability
BR-012	The system should permit configurable display ordering of key contact fields.	S	User experience / efficiency
BR-013	The system could support offline read-only access to the most recently synchronized approved directory data.	C	Future enhancement
BR-014	The system must prevent end users from editing centrally governed contact records from the mobile interface.	M	Core capability
BR-015	The solution must provide a defined process for onboarding and removing authorized users.	M	Core capability

4. Non-Functional Requirements

Requirement	Description
NFR-001 Security	Administrative access must require enterprise authentication and authorization appropriate to the user role.
NFR-002 Encryption	Sensitive directory data must be encrypted in transit using approved enterprise security standards.
NFR-003 Availability	The service should be available during defined business and executive-support hours, excluding approved maintenance windows.
NFR-004 Recovery	A documented recovery process must restore the service and approved contact dataset within the agreed recovery objective.
NFR-005 Auditability	Administrative changes must be logged with user, timestamp, action and affected record.
NFR-006 Performance	Common search and directory-open actions should complete within an acceptable interactive response time under normal load.
NFR-007 Usability	The mobile experience should require minimal training for authorized end users.
NFR-008 Maintainability	Authorized business administrators should be able to maintain directory data without code changes.
NFR-009 Privacy	Only information approved for the defined business purpose may be stored and distributed.
NFR-010 Compatibility	The solution should support the organization's current approved mobile-device categories and provide a manageable upgrade path.

4.1 Acceptance Principles

- All MUST requirements are implemented or formally waived by the accountable business owner.
- Security and access-control testing is completed successfully.
- Business administrators validate the maintenance workflow.
- Representative end users confirm search and contact actions meet usability expectations.
- Recovery and rollback procedures are documented and tested before production release.

5. Open Issues / Questions

Issue	Description	Status
Q-001	What is the long-term business ownership model for directory data maintenance?	Open
Q-002	What is the final authorized-user population and onboarding process?	Open
Q-003	Which contact fields are mandatory versus optional on mobile devices?	Open
Q-004	What is the acceptable synchronization window for urgent executive updates?	Open
Q-005	What recovery objective should apply outside standard support hours?	To confirm
Q-006	Which future enterprise data source should be considered for authoritative contact data?	Future consideration

6. Business Requirements Sign-off

The following signature roles are illustrative only. No historical employee names or internal approval details are reproduced in this portfolio version.

Business Sponsor

Signature Date

Product / Business Owner

Signature Date

Technology Delivery Lead

Signature Date

Business Analyst — Oksana Lisovska

Signature Date

Security / Risk Representative

Signature Date