GOVERNED TEMPLATE RENDERING REFERENCE: BRD DEFAULT V2 (DRAFT)

definition 87fa0260…47f3

BUSINESS REQUIREMENTS DOCUMENT · REQUIREMENT ARTIFACT

SPECIRA

Business requirements: Dispatch board

Meridian Field Services · Dispatch Modernization: instructional example, not project evidence

DRAFT · WATERMARK POLICY: DRAFT_ONLY

template brd v2 · pack: specira_default_delivery depth: standard

§1 Executive Summary

mandatory | written last · introduces nothing new

One paragraph the approving sponsor can repeat: the problem, the recommended option, and the headline benefit with its owner and date.

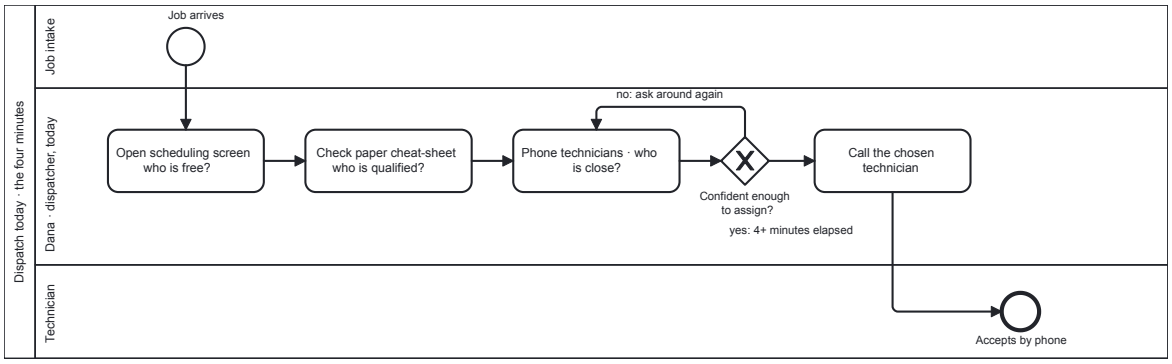
Dispatchers lose the first minutes of every job hunting across three screens for the right technician. This case recommends **building the live dispatch board** (total investment $380k to $520k) rather than licensing an off-the-shelf dispatch product, because Meridian's union rules and customer response-time contracts require assignment logic no vendor product expresses. The headline benefit, removing the dispatch-delay share of technician idle time, owned by J. Whitfield (operations sponsor), lands by **March 31, 2027**, two quarters after the October 1, 2026 Toronto pilot cutover, in service of the project's idle-time target (project PRD[1]).

§2 Problem & Opportunity

mandatory | 1 decision | 2 evidence rules

What happens today, as a measured fact, and what it costs. The template forbids adjectives here: "slow" is not a problem statement, "four minutes per job" is. When the problem lives in a process, the template shows the process: the loops and handoffs that cost the money, made visible.

The current process: where the four minutes go



BPMN 2.0: today's dispatch process, rendered by bpmn-js through Specira's diagram service. The loop on "ask around again" is the delay. Fallback: a job arrives → Dana checks the scheduling screen for who is free → the paper cheat-sheet for who is qualified → phones technicians for who is close → loops until confident → calls the chosen technician, four-plus minutes elapsed.

In the June 2026 sample, the average job waited **over four minutes** before anyone had even been asked to take it (assignment-delay sample[5]). Four minutes per job, across three hundred jobs a day, is the single largest controllable slice of the 18% technician idle rate the project has committed to reducing.

> **DECISION: PROBLEM SIZING**
>
> This requirement owns the assignment-delay slice of idle time. The remaining idle causes (travel inefficiency, schedule gaps) belong to other requirements and are not claimed by this case.

§3 Strategic Alignment & Why Now

mandatory · 1 decision · 1 evidence rule

Which project objective this serves (as a link, never a restatement) and why delay is costly.

This requirement serves the project objective "Technician idle rate at or below 10% by March 31, 2027"[1] by removing its assignment-delay component. **Why now:** Meridian's two largest customer contracts re-tender in **January 2027**; the October 1, 2026 pilot cutover gives a full quarter of measured improvement before those tenders open.

§4 Options Considered

mandatory · 1 decision · 1 evidence rule · validator: options_include_do_nothing

The honest comparison. Every option is scored on the same criteria, and every verdict carries its evaluation trace: what the option is, why it was considered, who evaluated it, how, and what they found. A verdict without its reasoning is a conclusion, not a decision. The full comparison lives in the attached workbook; this section summarizes it.

> **DECISION: CRITERIA, AGREED BEFORE SCORING**
>
> Four criteria, weighted in this order: fixes the assignment delay · respects union and contract rules (a gate, not a weight) · total cost over three years · time to first value. Agreed by R. Okafor (VP Operations) and A. Reyes (product lead) on June 23, 2026, before any option was evaluated.

Option	Fixes the delay?	Rules gate	3-year cost	Time to value	Verdict
Do nothing	No	Passes	≈ $2.1M forfeited over 3 yrs*	n/a	Baselir
License an off-the-shelf dispatch product	Partly	**Fails**	fee overtakes build in ~3 yrs	~6 weeks	Decline
Build the dispatch board	Yes	Passes	one team, 1 to 2 quarters	~1 quarter	**Recom**

* $700k/yr assignment-delay share × 3 years. A different quantity from the project-level $2.1M ANNUAL total idle cost the PRD cites: the delay share is the slice this requirement removes. Both derive from the attached cost model[4].

How each option was evaluated

BASELINE

Do nothing: continuing with three screens and phone calls.

Why considered: every case prices its baseline. **Evaluated by** the operations analyst from the June delay sample (sample[5]), method: extrapolation of the delay share across billable rates. **Found:** roughly $700k a year forfeited, ≈ $2.1M over the three-year horizon.

DECLINED

Off-the-shelf dispatch product: a licensed field-dispatch suite.

Why considered: proposed by S. Grewal (fleet manager) for its speed to value. **Evaluated** June 24 to 28, 2026 by P. Novak (operations analyst) and M. Chen

(dispatch team lead): vendor demo, a reference call with a comparable 350-technician fleet, and a walkthrough of the union rules against the product's assignment engine. **Found:** strong on time-to-value (~6 weeks) and mobile app quality; **failed the rules gate**: it cannot express the union assignment-ordering rule (rule[6]), and its per-technician fee (vendor quote, June 26, 2026) overtakes build cost inside three years. **Why declined:** a gate criterion failed; price confirmed the direction.

RECOMMENDED

Build the dispatch board: the option this case recommends. **Why considered:** the only path that owns the assignment rules outright. **Evaluated** July 1, 2026 by E. Sandoval (engineering lead): sizing against the existing vehicle-tracking feed and the current platform. **Found:** passes the rules gate, wins three-year cost, loses time-to-first-value to the vendor option (~1 quarter vs ~6 weeks); accepted because the pilot phasing absorbs it. **Trade-off accepted:** we forgo the vendor's packaged mobile app in the first release.

Full scoring, quotes, and reference-call notes: Options evaluation workbook[3], attached to this package.

§5 Business Success Criteria

mandatory · 1 decision · 1 evidence rule

How the business (not engineering) will know this worked. Each criterion carries its agreed measurement methodology: how it is measured, how often and where it is reported, and who tracks it. Deciding this at approval is what prevents the downstream argument about whether "achieved" was achieved.

The business signs off when, and only when:

We will observe…	Today	After	How measured	Reporte
Time from a job arriving to someone being asked to take it	4+ min	< 1 min	Same timestamp method as the June baseline sample, so before/after stay comparable	Weekly · operatio dashboa

We will observe…	Today	After	How measured	Reporte
Dispatchers run full shifts on the board without reverting to the old screens	n/a	0 reversions in pilot weeks 3 to 4	Old-screen usage log plus direct observation (weeks 1 to 2 are the learning period)	Weekly · pilot review
Customer response-time promises kept during rollout	93.5%	no decline	Existing contract-compliance report; no new method invented	Monthly account review

DECISION: MEASUREMENT METHODOLOGY ACCEPTED

The sponsor approves these three methods, cadences, and forums together with the targets. Changing a measurement method after approval is a change to the case, not a reporting detail.

§6 Benefits & Who Owns Them

mandatory · 2 decisions · 1 evidence rule · validator: benefit_has_owner_measure_and_date

The benefit register. The template's rule is blunt: a benefit without a named owner, a measure, and a date is an aspiration, and aspirations don't enter the register.

Benefit	Owner	Measured by	Today → target
Dispatch-delay share of idle time eliminated	Operations sponsor	Assignment delay (same method as the June sample)	4+ min → <1 min

Benefit	Owner	Measured by	Today → target
New-dispatcher onboarding halved	Dispatch team lead	Weeks until a new dispatcher runs a shift solo	`6 → 3 weeks`
Dispatcher confidence in assignments INTANGIBLE	Dispatch team lead	Quarterly staff survey, tracked honestly, not converted into a fabricated dollar figure	`survey in pilot week 1 sets the baseline`

Each measured benefit rolls up to the project's idle-rate objective (PRD success metrics[1]). The chain from this requirement's output to the business outcome is explicit, so in a year we can tell whether the benefit actually landed and who is answering for it.

§7 Costs, Effort & the Assumptions Behind Them

mandatory · 1 decision · 1 evidence rule · validator: no_return_figure_without_basis

The full form: total investment stated, cost breakdown by category, timeline with its critical path, the payback calculation shown, and the sensitivities that matter, each with the number that triggers action. This investment is neither small nor easily reversible, so "accepted uncertainty" alone would not clear the template. The detailed model is attached; this section summarizes it.

Total investment: $380k to $520k (delivery, internal time, and first-year run, from the attached cost model[4]). The upper end applies only if the union clarification forces propose-only rework.

Cost category	Range	Stands on the assumption…
Delivery: one team, build and pilot	Aug to Oct 2026 (+1 qtr if rework)	Tracking feed integrates as sampled; no union-rule change mid-build (validated before commitment, §12)
Internal time: pilot participation	1 shift/week × 6 weeks	Toronto pilot hub; staff backfill available on those shifts
Ongoing run: hosting and feed costs	low, recurring	Current platform contracts hold; no new vendor
Opportunity: what this team doesn't do	reporting backlog defers 1 quarter	Accepted by R. Okafor (VP Operations) in prioritization

Timeline and critical path. Build August to September 2026 · distance-proxy shadow trial September 1 to 14 (gates pilot commitment) · assignment-speed baseline September 1 to 26 · **Toronto pilot cutover October 1** · remaining four hubs November 3 to December 12, gated by the PRD guardrails. Benefits start at pilot cutover, not at project end: the pilot hub's delay reduction is real recovered time from week one, a full quarter before the January 2027 contract re-tenders.

> PAYBACK: THE CALCULATION, NOT THE CONCLUSION
>
> Recovered billable hours = (delay reduction per job) × (jobs per day) × (billable rate). At target values (three minutes recovered × 300 jobs × the standard rate), recovered hours overtake the total cost of this case within the first year. Inputs, method, and the worked result: cost model[4], attached to this package.

Sensitivity, with the numbers that trigger action. The result moves most on two assumptions. **Adoption:** the planned pace is 80% of Toronto dispatchers running full shifts on the board by pilot week four; at half that pace, payback slips roughly two quarters and the case still holds. **Delay share:** if revalidation (two additional hubs, before commitment, §12) shows the assignment-delay share more than 25% below the June sample, this case returns to R. Okafor before build starts.

> DECISION: INVESTMENT APPROVAL

> The sponsor approves the category ranges and timeline above: a reasoned range, not a fixed price. Re-approval is required if any category leaves its range or the payback conclusion changes sign, not if weeks shift inside a quarter.

The simple form, and when it is permitted. *For a small, easily reversible spend, this section may shrink to: "Effort class: small. Under two weeks, one developer, no ongoing cost. Assumes the export API covers the fields (checked June 12). Qualifies for the simple form: reversible in a day, no contract or headcount impact." The qualification sentence is mandatory: the simple form is a justified choice, not a shortcut.*

§8 Business Requirement Statements

mandatory · 1 decision · 1 evidence rule

What the business needs the ability to do: one need per statement, in business language. How the system will behave lives in the functional spec each statement links to.

The business needs the ability to…	Essential?	Realized by
See every open job and every technician's status in one place	Essential	Functional spec: Recommendation rules[2]
Assign a job in one action, with the reasoning visible	Essential	Functional spec: Recommendation rules[2]
Reassign instantly when a technician becomes unavailable	Essential	Functional spec: Recommendation rules[2]
Prove response-time compliance per contract from recorded assignment history	Essential	Functional spec: second slice

§9 Business Rules & Policies Referenced

conditional · active: policies constrain this requirement · 1 decision · 1 evidence rule

The rules this requirement must respect, each one a link to its knowledge-base entry, where the rule's full text and history live. Rule logic is never copied into this document, so the rule can evolve in one place.

Rule	What it means for this requirement
Union assignment-ordering rule[6]	The board proposes, people decide: until the rule is formally clarified, nothing is assigned automatically.
Contractual response windows[7]	Assignment history must support per-contract compliance reporting.

§10 Accountability & Stakeholders

mandatory · 1 decision · 1 evidence rule

The accountability register: one row per person, so it stays readable no matter how many parties are involved. Names here match the benefits register exactly; the full project responsibility grid lives at project level, not here.

Role	Name	Accountability	Answers for
VP Operations	R. Okafor	**Approves**	This business case; the accepted risks in §11
Operations sponsor	J. Whitfield	**Owns benefit**	Idle-rate benefit, at its end-2026 realization date
Dispatch team lead	M. Chen	**Owns benefits**	Onboarding and confidence benefits, Q1 2027
Dispatch staff representatives (2 hubs)	per hub	Consulted	Pilot co-design; override reason codes
Product lead	A. Reyes	Consulted	Co-owns the option criteria (§4) and the feature ranking in the PRD
Fleet manager	S. Grewal	Consulted	Tracking-feed dependency (§12)
Account management lead	T. Fontaine	Informed	Tracks the contract-compliance criterion (§5)

Register entries trace to the project's stakeholder records[8], linked, not redescribed.

§11 Risks to the Business Case

mandatory · 1 decision · 1 evidence rule · validator: risk_rows_complete

What could stop the benefits landing. Every risk carries how likely (Likely = better-than-even odds; Possible = 10 to 50%), how bad (impact stated as its effect on the case), and what we do about it; a risk missing any of the three is incomplete and the template says so.

RISK · MITIGATED

Dispatcher adoption stalls

Likely (>50% without countermeasures) · high impact: defers the idle-rate benefit at least one quarter and can trip the assignment-speed guardrail · mitigated by pilot-hub co-design and the one-tap override-with-reason design; adoption tracked weekly against the 80%-by-week-4 pace (§7). Owner: M. Chen (dispatch team lead).

RISK · ACCEPTED

Union clarification goes against any automation

Possible (10 to 50%) · medium impact: the upper cost bound (§7) applies, benefits unchanged since the board stays fully useful in propose-only mode. Accepted by R. Okafor, VP Operations (decision record[9]).

§12 Constraints · Assumptions · Open Questions

3 mandatory sections, condensed here for the reference

The remaining governance sections, rendered in the same discipline: every constraint cites its authority, every load-bearing assumption carries a validation plan, every open question has an owner and a date.

CONSTRAINT

Collective agreement §14 governs assignment ordering

Authority: the agreement itself, cited. Without a citable authority this line would be reclassified as an assumption (template rule).

CONSTRAINT

Customer and location data stays in Canada

Authority: enterprise contracts.

ASSUMPTION

The June delay sample is representative

Load-bearing: the do-nothing cost and the payback both stand on it. Revalidated across two more hubs by August 22, 2026, owner P. Novak; a shortfall beyond 25% returns the case to the sponsor (§7).

DEPENDENCY

Vehicle-tracking feed access

Owner: fleet manager. If it slips, the pilot proceeds with manual status and the idle measure starts one month late.

Open question	Owner	Answer by	Blocks
Will the union clarification arrive before rollout widens beyond the pilot hub?	N. Duval (Legal & Operations lead)	Aug 1, 2026	The automation decision, not the pilot (tracked at project level[10])

Refs References & Package Contents

Everything this case points at. Package items travel in the same export bundle; workspace items link into Specira where the full record and its history live.

In this export package

PACKAGE [1] Product Requirements Document: Dispatch Modernization
./prd-dispatch-modernization.docx

PACKAGE [2] Functional spec: Recommendation rules
./frd-recommendation-rules.docx

PACKAGE · ATTACHMENT [3] Options evaluation workbook: scoring, vendor quote, reference-call notes
./options-evaluation-dispatch-board.xlsx

PACKAGE · ATTACHMENT [4] Cost model: payback inputs, method, and worked result
./cost-model-dispatch-board.xlsx

In the Specira workspace

SPECIRA [5] Fact: Assignment-delay sample, June 2026
app.specira.ai/projects/dispatch-modernization/facts/assignment-delay-jun26

SPECIRA [6] Knowledge base: Union assignment-ordering rule
app.specira.ai/kb/entries/union-assignment-ordering

SPECIRA [7] Knowledge base: Contractual response windows
app.specira.ai/kb/entries/contractual-response-windows

SPECIRA [8] Stakeholder records: Dispatch Modernization
app.specira.ai/projects/dispatch-modernization/stakeholders

SPECIRA [9] Decision: Propose-only fallback accepted (VP Operations, July 2, 2026)
app.specira.ai/projects/dispatch-modernization/decisions/91

SPECIRA [10] PRD open questions (project level)

app.specira.ai/projects/dispatch-modernization/artifacts/prd#open-questions

Omission note style: a BRD for a requirement with no applicable policies renders §9 as: "§9 Business Rules omitted: no policy constrains this requirement. Rationale recorded in adaptation event #2."

Generated by Specira · template brd v2 (draft) · pack specira_default_delivery

lineage 87fa0260…47f3 · page 1 of 10