**Telco CRM (e.g., with M-PESA) Cloud Enablement**

This deliverable documents the successful migration, configuration, and operational readiness of the Customer Relationship Management (CRM) platform within a cloud environment, fully integrated with mobile money services such as **M-PESA**.

**Scope**

* Migrate the existing on-prem CRM system (e.g., Salesforce, Zoho, Microsoft Dynamics, or a custom telco CRM) to a cloud-based solution.
* Integrate M-PESA API for customer billing, payments, refunds, and airtime purchases.

**Components**

| **Element** | **Description** |
| --- | --- |
| **CRM Cloud Environment** | Deployment of CRM on a secure cloud platform (AWS, Azure, GCP, or SaaS CRM). Includes high availability, backups, and performance SLAs. |
| **M-PESA API Integration** | End-to-end integration for transactional services (C2B, B2C, B2B). Uses Safaricom Daraja API or equivalent. |
| **Customer Data Migration** | Secure transfer of all CRM records, contacts, billing info, and support tickets. Data cleansing and deduplication included. |
| **Authentication & Security** | IAM setup, token-based access, role-based privileges, and encryption of sensitive customer and transaction data. |
| **Workflow Automation** | Cloud workflows for onboarding, support ticketing, billing cycles, and loyalty programs. |
| **UAT & Regression Testing** | All features and M-PESA integration validated with real test data. Includes error handling and fallback logic. |
| **Training & Handover** | Team enablement on using CRM dashboards, managing payment workflows, and reporting. |
| **Operational Dashboard** | KPI monitoring for transactions, customer satisfaction, and issue resolution. |

**Benefits**

* Enables **real-time** customer transactions and service activation via mobile money.
* Reduces CRM latency and increases system availability (99.9%+ uptime).
* Simplifies financial reconciliation and improves customer satisfaction.

**Sign-Off**

✅ CRM Owner  
✅ DevOps / Cloud Architect  
✅ M-PESA Integration Lead  
✅ Project Manager