Expanding features for CRM systems products, part 1

INTRO

AUTOMATIC ACCOUNT SEARCH

KNOWLEDGE BASE

APPLICATION FULLFILLMENT

OUTAGE PROCESS

Intro

FileRight is an online preparation service for immigration documents based out of Silicon Valley, think TurboTax but for immigration. This is a case study of my time as full-time Product Manager at FileRight from 2013-2014, during which the organizational objective was to be the leading brand in immigration, citizenship, and visa services while increasing annual customers from 2 to 6 million.

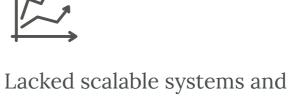
Challenges At the time of my onboarding, the biggest problems facing FileRight included:



resulted in the need to hire and train new employees



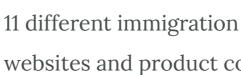
in frequent outages and downtime



tools to accommodate 4 million new customers



between the CRM systems products



websites and product code bases to maintain

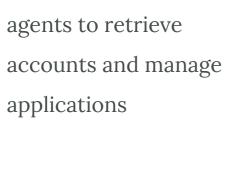


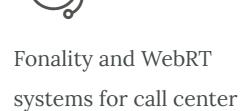
center agents CRM Systems is the product, but what does that mean?

The CRM Systems are all the tools customer service, sales, and marketing teams use to manage

customer relationships. Some of these systems were developed internally or acquired from vendors, and were loosely integrated with each other. The CRM systems included:



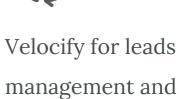




agents to interact with the customers



reporting and analytics



SilverPoP for email marketing Each of these fulfilled a specific function that was essential to providing customer support and

Brand 6

customers. Role & Process

As the first ever CRM systems product manager at FileRight, I had the opportunity to define the role and

making sales. FileRight combined all of these systems to effectively communicate with and manage

Aligning with company goals

what it meant for the organization, as well as set a vision and strategy for the future. Initially, I met with the key stakeholders, the core product team, and more than 50% of the daily CRM systems users to

understand their problems intimately. To put myself in the shoes of my end users, I spent several hours per week engaging with real customers via the CRM systems. After I had a good grasp of the pain points, I pitched my role as generating, defining, prioritizing, and validating ideas and features for development. These were then marketed to end users and released on a regular cadence. Low hanging fruit and quick wins FileRight was an established business with millions of annual customers, so it was natural to go after

existing issues like session timeouts and system outages while new ideas were being generated. There

were about 30 items in the CRM systems backlog when I arrived. 90% of these items were without

I also began defining requirements and writing specifications for the items engineering would be

defined requirements or specifications, and weren't in user story format. During the first few weeks,

while meeting the stakeholders, other product teams, and end users, it was important to our agile process that all items in the backlog get converted into user stories with clear goal and value statements.

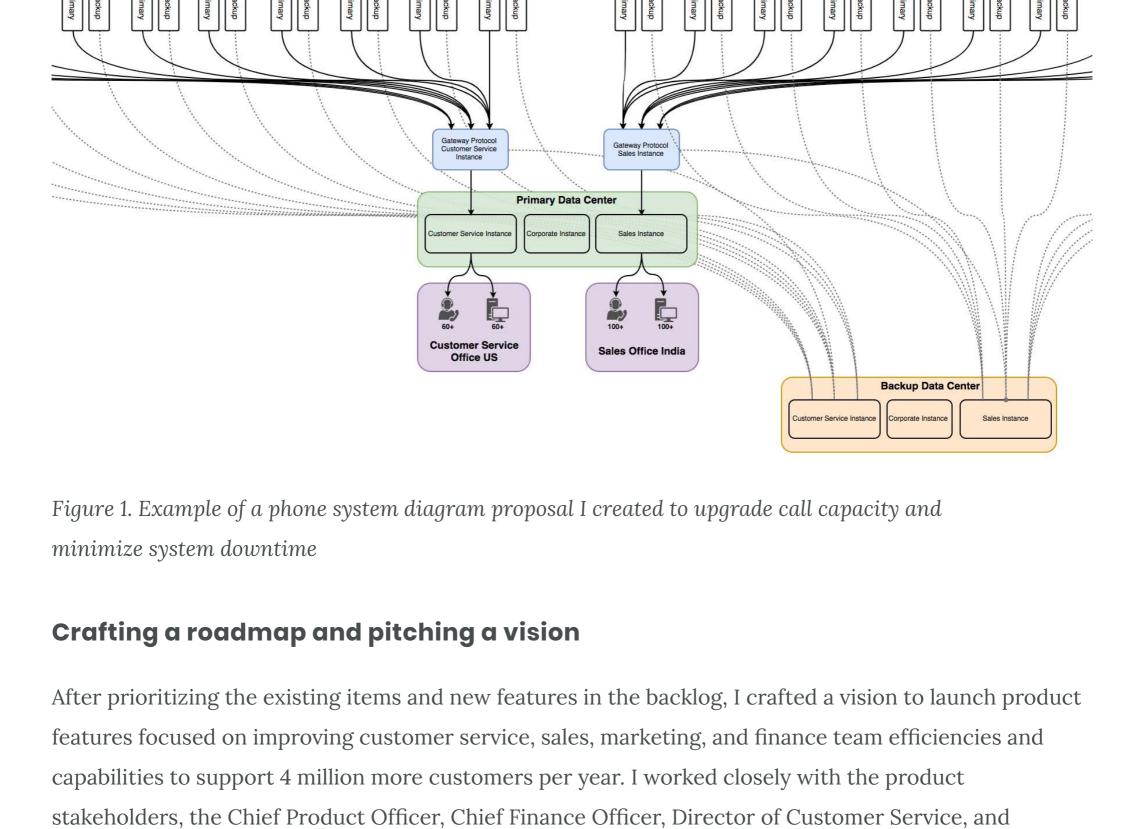
tackling in our next sprint.

Brand 8

Brand 6

Brand 10

New features and product discovery Great ideas can come from anyone inside or outside the organization, so I setup a bi-weekly product discovery team with leads from each department. After a couple sessions, we had a list of new problems, feature requests, and user experience bugs that needed to get prioritized. There was little to no documentation on the systems I was supporting, so I created and published user manuals, system diagrams, and product specs for existing products and new features.



anywhere.

concepts and requirements to my team of 9 engineers.

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Fileright.com CRM Systems Product Vision **Problem Statement:** The FileRight CRM System (CRMS) is not currently reliable or scalable. The 8+ systems being used to manage customers regularly experience outages and lacks integration. Product updates, new features, and new reports take months to develop. Additionally, there are no external APIs allowing for third party system integrations.

Director of Sales to gain buy in and execute on my CRM Systems product vision and strategy.

Scope: The scope of this product vision specifically depicts the Fileright.com brand. Other 11 brands would share this same vision as the needs from brand to brand overlap more than 99% of the time.

Product Vision: The CRM Systems team envisions Fileright.com having the capabilities to

Solution: Implement "future-proof" and well-established CRM features and updates.

provide: A single launch point for all customer interactions A system that is fast, easy to use, highly available, and accessible from

> Robust, flexible, and role-based security model with audit trail of all changes An ability to scale at a 10x rate A 360° lifetime view of an customer

> > 650-460-8812

Integration of all business critical CRM Systems

Figure 2. Example of the CRM Systems product vision document I created I created mocks and prototypes for all the following features, as our team did not have a dedicated design resource. Along with user stories and feature briefs, these were effective in communicating

CONTINUE TO PART 2: AUTOMATIC ACCOUNT SEARCH