CASE STUDY

Expanding features for CRM systems products, part 1

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:

- Non-automated systems resulted in the need to hire and train new employees
- Unreliable systems resulted in frequent outages and downtime
- Lacked scalable systems and tools to accommodate 4 million new customers
- Little to no integration between the CRM systems products
- 11 different immigration websites and product code bases to maintain
- Outdated and non-complient legal documentation for call center agents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:

- Admin sites allowed agents to retrieve accounts and manage applications
- Fonality and WebRT systems for call center agents to interact with the customers
- Google spreadsheets and tableau for reporting and analytics
- Velocify for leads management and SilverPoP for email marketing

Each of these fulfilled a specific function that was essential to providing customer support and making sales. FileRight combined all of these systems to effectively communicate with and manage customers.

Role & Process

Aligning with company goals

As the first ever CRM systems product manager at FileRight, I had the opportunity to define the role and 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 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. I also began defining requirements and writing specifications for the items engineering would be tackling in our next sprint.

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.

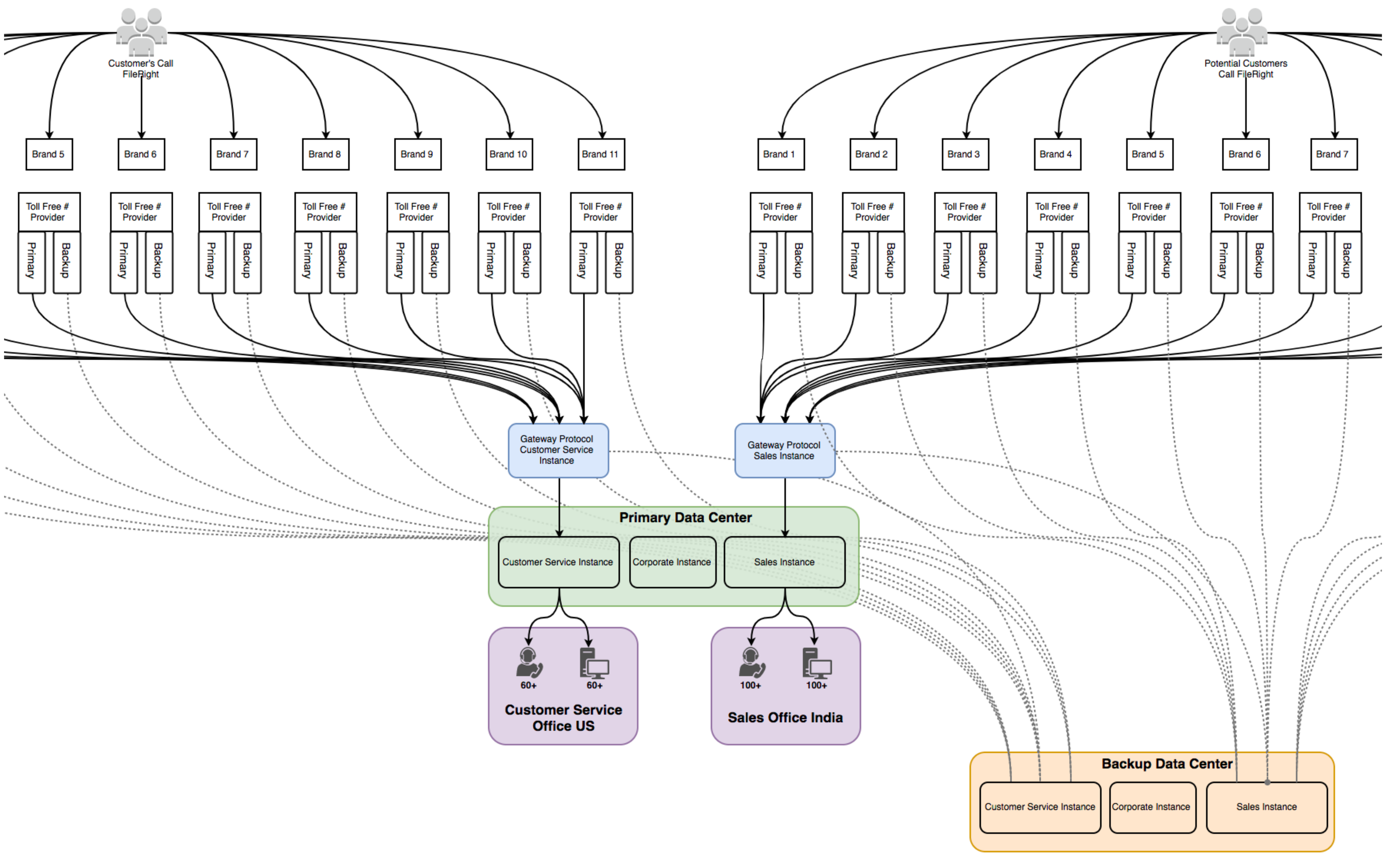

Figure 1. Example of a phone system diagram proposal I created to upgrade call capacity and minimize system downtime

Crafting a roadmap and pitching a vision

After prioritizing the existing items and new features in the backlog, I crafted a vision to launch product features focused on improving customer service, sales, marketing, and finance team efficiencies and capabilities to support 4 million more customers per year. I worked closely with the product stakeholders, the Chief Product Officer, Chief Finance Officer, Director of Customer Service, and Director of Sales to gain buy in and execute on my CRM Systems product vision and strategy.

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.

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.

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

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

- A single launch point for all customer interactions
- A system that is fast, easy to use, highly available, and accessible from anywhere.
- Integration of all business critical CRM Systems
- 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

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 concepts and requirements to my team of 9 engineers.

CONTINUE TO PART 2: AUTOMATIC ACCOUNT SEARCH