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| Pepper Marketing |
| Business Vision and Scope Specification |
| Draft 1.1 |

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# Business Requirements

## Background

Pepper Marketing is a boutique marketing agency whose success is built on its communication, customer service, and client relationships. By moving away from a strict billable hour’s model utilizing time sheets to a fixed cost agreement, pepper is able to spend more time in briefing and discussion focused on marketing challenges, approaches and ideas. Pepper makes marketing easier. From large business who might need further execution capacity or specialist skills to small business who for the first time realise the need to invest properly in marketing.

One important component of Pepper Marketing’s business is it’s telemarketing services. Pepper has specialist skills in delivering telemarketing lead generation campaigns specifically in the Information technology industry. These campaign can vary in terms of size and duration. As an example one client in particular Aruba networks has invested continually in services over the many years since Pepper Marketing’s inception, over that time a complicated process has evolved to support all the activities involved in developing a campaign and supplying results to the customer. General sentiment in the organisation is this process could be improved, particularly in how call lists are handled, and the way in which the telemarketer enters data into the system. As Pepper continual aims to increase both quality of delivery and its capabilities, there has been a decision to at least try to drive efficiency around the process by developing further automation and investing in a software module that can support the telemarketing process end to end.

## Business opportunity

Automation of the Telemarketing function in Pepper Marketing aims to realise a number of benefits. Currently one of the biggest overheads to the business is management of large excel data sheets, which are used in multiple systems. There are numerous points at which double handling occurs, errors are produced, or simply manual handling time of repetitive tasks can be can be removed. Peppers greatest strength lies in its marketing capabilities; time taken away from campaign briefings, preparation and execution eats into profit margins and stops Pepper Marketing doing what it does best. Errors and manual work in regard to administrative tasks lowers quality and the value of the services or end product the customer receives.

The system also stands to improve the quality of the calls being made. Proper visualisation of the information as well data inputs needed to make and finish the call improve quality of outcomes. Linking to briefing material and call scripts maximise screen real estate and improve usability and streamline work flow. Further considerations of reward mechanism such as those used in gamification (visual Badges XP and points), and training material like quiz’s on technical knowledge can enhance the competencies of the telemarketing workforce via an instant feedback loop as they use the system.

Another opportunity presents itself around management of all the data going through the system. Large volumes of marketing data relating to the telemarketing system are being used. It cannot be said this data is currently managed effectively. The need to consolidate and create one repository of all data relating to all clients, is that the data can be further leveraged/mined for insights. These insights can either be feedback into improving the process and outcomes further or be offered as analytical services to the customer. In addition, a history/record is kept of all activity and saved permanently, easily accessible again at any time.

The benefit of API integration, or the ability to send information to other systems must also be considered. Pepper Marketing largely have adopted Salesforce due to customer demand, however other systems like Act-On and at any time another system, at a customer’s whim, may be required. Integration work pulling data from one system to another in fact does compromise a large part of Pepper’s Marketing Telemarketing process work. Any automation and streamlining here will result in quality of work and profitability gains for the company. However, these customised process are also part of the value that Pepper Marketing brings to the table when working with specific customers, so these are often the most complex process to automate.

## Business objectives

### Table 1.1

|  |  |
| --- | --- |
| **Objective** | **Description** |
| Increase efficiency | * Improve creation and management of call lists, by the campaign manager in preparation for the telemarketer to call. * Improve view, mechanisms and recording of data to support the calling from the call list for the telemarketers. * Provide in-depth search functionality with the option to pull up contacts and previous call lists. * All functions should be with the aim of improved speed, quality of result and decreased overhead. * Maximise screen real estate by providing linking to brief, and call history |
| Performance and feedback | * Provide resources, track performance and provide feedback to Telemarketers * The options to include quiz’s training materials and gamified rewards as a way of expansion. |
| Consolidate data | * Consolidate all telemarketing related data under the respective clients. * Keep historical records of all calls made. * Validate and remove duplicate data. * Timestamp all records. * Leverage new cloud based solutions to gain fast access to nearly unlimited (or more than an organisation like Pepper Marketing could use and store in 100 years). |
| Remove Error | * All data is only editable via an interface screen. * The system will only allow certain fields to be written in the system. * Data is automatically save as soon as it is entered in to field. * No saving of excel or any other document is needed. |
| Improve insight | * Data can be query via the database directly, or separate module can be built to front end commonly used queries. * As data is stored, it can be subject to further analysis to find patterns and potential useful information that can be highlighted to clients, or even sold as a services. |
| Scale | * The system can instantly scale up to one or many telemarketers. * The system can be accessed from anywhere with internet and the appropriate browser. * The resources on the backend can scale with cloud based technologies. |
| Reporting | * System can at a minimum output the reports client requires in excel. * Special report template can also be built and used, in formats like pdf to a web url for customers to access. |
| Data output | * Integration into another CRM, needs to be factored in. * Creating an api- or plug ability will further streamline efficiencies and process. * At a minimum it should output an text, excel document of results |

## Success metrics

Specifies the indicators stakeholders can use to define and measure success on this project, in addition here is list those factors that have the greatest impact on success.

### Table 1.2

|  |  |  |
| --- | --- | --- |
| **Metric** | **Measurement** | **Description** |
| **Time taken to deploy** | Days to real world deployment. February 2017 | The amount of time taken before a working version of the product can be used by the telemarketer to make and record calls and for the campaign manager to import lists and produce a report of calls made for the client. |
| **Objectives points met** | Number of objectives points the solution meets. x/8 | Out of all the objective list how many have been meet and which once. |
| **Time saved** | Actual level of efficiency achieved – Aiming for 20% | When double handling and errors are removed and time to develop call list and call results are reduced, the system is hoping to be at least 20% faster. That equates to 1 day less work a week (for the telemarketing team), or 1 extra day that can be used for other ‘*preferable*’ activities. This is a very rough measure, it may be worth looking at all the time consuming tasks to get a better picture of the exact efficiency involved. |
| **Internal adoption** | Sign off by all internal parties as to requirements. | All members of Pepper exposed or using the telemarketing system must agree to a list of requirements and be allowed to review and make changes during the entire lifecycle of the software system. |
| **Client satisfaction** | Qualitative measure. Quality of results is noticeable in a positive way to clients | Once the system is in place and results are being sent to the customer. At a minimum they should see no change, however it is hope the improved accuracy, formatting and format leads to an enhance presentation of results which is noticed positively by the client. |

## Vision statement

***A system “For*** *Campaign Managers and Telemarketers* ***who*** *perform telemarketing with a specified call list, and record all data and call outcomes, and then report the results;* ***the*** *Pepper Telemarketing Software**System* ***is a*** *custom built software system* ***that*** *is**a single point of access to allow the creation of a new client database which contains all information relating to call lists generated by the campaign manager, and called on by the telemarketer. Having all results recorded to the client’s database, which can be reproduced and reported on in a format which satisfy the client. This system will be deployed by February 2017, save a minimum of 1 day a week worth of undesirable work, with all requirements agreed to and constantly reviewed by all stakeholders* ***unlike*** *the existing process, which requires manual use of excel spread sheets to capture the calling process.* ***This product*** *will capture all data via a web based application interface, hosted in cloud and accessible from anywhere with an internet connection.”*

## Business risks

Aside from development/technology risk or project risk i.e. blown scheduling, features not working i.e. bugs inability to meet requirements, not finding the right developer. Business risk factors are documented here and include:

### Table 1.3

|  |  |
| --- | --- |
| **Risk** | **Description** |
| User Acceptance | Once built all users need to buy into using the system to make it successful, even if the system meets all requirements, user by in is not guaranteed. This is seen as low risk as the users are heavily invested in the requirements gathering process and therefore likely to feel a vested interest in what is developed. |
| Clients | Losing a major client ‘Aruba’ or if unexpected client requirements appear late in the development cycle that impede on a project could be seen as a risk to the project. |
| Competition | To not develop and improve process may leave Pepper less competitive in a heavily competitive industry. |
| Implementation issue | There is a risk that later in the cycle a developer may decide the requirement cannot be meet or it would be too expensive, or some other limiting factor thus preventing implementation. |
| Perception | To not adopt or even to adopt such a software system maybe to create a certain perception in clients or some stakeholders. This could be negative or positive and needs to be managed. Is this innovative of foolish? |

## Business assumptions and dependencies

This document has been created with the assumption that Pepper Marketing has already decided it requires to invest in automation in this area. It acknowledges a previous attempt has been made but was stopped. This was because the requirements were not given appropriate attention and the end high level documentation was inaccurate. It is an assumption that greater clarity and more time spent documenting requirements will lead to better design and a successful project.

Another assumption is the efficiencies gains the project will make, no attempt has been made to measure time taken to do tasks, just that overhead and errors exist in the current way of working. There are no statistics that can be offered, or used as success metrics other than a vague 20% value, which represent an efficiency gain of 1 day a week for the whole team.

The biggest assumption this documents makes is that it is possible to consolidate and manage all the data Pepper Marketing receive from its client ‘Aruba’. At last count the excel was at least 100,000 records long and 60 -70 field wide. An experience database analyst or equivalent should be engaged to reconcile this.

# 2.Scope and limitations

## 

## 2.1 Major features

The major features of the system included:

|  |  |
| --- | --- |
| **Feature Name** | **Description** |
| Administration | *Create Client* - Creates the client, all details regarding the client are input.  *Create Campaign* - Creates a marketing campaign for calling, all fields needed for the campaign are created. A campaign template can be created.  *Create EDM’s* -Any Electronic Direct Mail to be used will need to recorded as being part of a campaign.  *Create Campaign Call Questions* - Any questions to be asked by the telemarketer, who’s answer must be recorded need to be created and added to the campaign.  *Create Telemarketer Account* - The administrator can create additional telemarketing users. With a login and password |
| Upload Database | This function allows for a mass import of contact records into a selected client’s database. It must do:   * De-duplication of contact and account. * Any duplications must be brought to the users to approve or allow. * Cleansing of erroneous data i.e. does meet define data definitions. * Automatically prepare and structure the information as templated (TBD) |
| Upload Call List | Upload a pre-pared call list in excel, under a selected campaign.   * De-duplication * Any duplications must be brought to the users to approve or allow. * Cleansing of erroneous data i.e. does meet define data definitions. * Automatically prepare and structure the information as templated (TBD) * Assign the call list to a telemarketer user. |
| Edit Call List | Be able to view a call list that has been uploaded, and/or assigned.   * De-select members of the call list. Individually or as a group. * Search contacts to be added to the call list. * Re-assign the call list to a telemarketer user. |
| View Call List | View all call lists created under a campaign and their assignment.   * Be able to search on the call list by name, or contact or [any field] in the list. * Select to edit a call list. * Select to review call outcomes for a call list. |
| Search Contacts | Search function that’s allows the user to search for a contact or multiple contacts. Search can be made on any searchable string, and can be narrowed down with filters. Which include:   * Data/Time called * Call outcome * Client * Campaign * Telemarketer * Other Data Field {state, job title, company etc} |
| Review Call Outcomes | Be presented with a screen showing the results of all calls made to the call list. The call outcome field can be edited and saved after revision to the call outcome notes have been made. This can be filtered to show specific contacts or multiple contacts from the list. Including filtering on:   * Data/Time called * Call outcome * Other Data Field {state, job title, company etc} |
| Create Telemarketer Account | The administrator can create additional telemarketing users. With a login and password |
| Generate report | The system shall allow the selection of a call list from a client’s campaign to be prepare to show call outcomes and have the system generate an excel report to show the results of the calls made to the list. This will allow a template to be selected for the formatting of the report [TBD]. |
| Make Call | The Telemarketing user shall be able to enter a record on an assigned call list and be presented with a call information screen. The screen will show:   * Client information [TBD] * Campaign information [TBD] * Account level information, including other contacts names, titles in the account, these are selectable, in a way the telemarketing user can navigate between making calls to multiple contacts in the account. [TBD] * Call history, a list of the results and the notes of all calls made to the contact for a selected call client, showing the campaigns called for. * Space for a call script to be shown, and links to the briefing materials.   The call screen will present editable fields for (all fields will automatically save data as it is entered):   * Call outcome * Call notes * Campaign questions   The call screen will allow for a new contact to be created in the case of a contact being wrong, having left the business, or re-referral to another contact in the account.  The call screen will be navigated by previous and next button or return to call list, which when pressed shows the relevant contact. Clicking the call list will show the call list contacts where the specific contact to call can be selected from the list.  The call screen will also have the option to ‘validate account’ and ‘validate contact’. This will allow for the Account details and Contact details to be checked against existing Accounts and Contacts in the database and linked so as to avoid duplication and allow for the system to look up the contacts call history. |

### Table 2.1

## 2.2 Scope of initial release

The initial release should be focused on *‘what is the bare minimum of functionality the software product needs to implement to be useful’*. Drawing from the list of Major features, the system shall be able to take in data relevant to a clients telemarketing requirements and allows telemarketing to occur so as to address the clients telemarketing requirements. This means the data must be organised to fit the purpose of telemarketing call campaigns. That includes the input of call list data, the structuring of that data and its maintenance. In addition, the system must at a basic level provide results from the calling in a data format appropriate (excel) to meet the client’s requirements.

The other part of the system is to provide a more efficient, and useable function to make and record the data collected from making the Telemarketing calls. That includes providing an interface to view the necessary information required to make and improve the outcomes of a call, and to provide the interface functionality to maintain strict adherence as to the consistency and nature of the data to be collated from the making the call. Finally, the system must allow clear, easy, and precise navigation around its components. That means provide the ability to manipulate and view the data in different screens to meet user requirements as outline within the system Major features.

## 2.3 Scope of subsequent releases

The system needs to consider further development phases which will add additional ‘nice to have functionality’

1). Better reporting template formats presented via the web or in a pdf document, BI dash boarding, showing just-in time statistical information. This could be extended in to analytics, the ability to query the database to look at patterns and metrics over long periods of time.

2). System integration beyond just an excel document. Utilisation of API in salesforce for example to automatic export data.

3). Gamification score board, recognition and award module

4). Possible accounting functions, for the automatic billing of work done.

## Limitations and exclusions

This document describes the business objectives, the opportunity development of the software would bring, as well as associated risk. It further outlines at a high level the system requirements and the bare minimum needed to make a successful software product that would be used across the business to replace an existing process with a better one.

It does not make assumption about technology requirements, and capabilities of the developer to deliver. Nor does it expand into more detailed user requirements or pick a particular development methodology.

Items beyond the scope of the initial release have been listed, showing a clear delineation is in place as to what will not be done.

# 3.Business context

## 

## 3.1 Stakeholder profiles

The system defines 4 stakeholder groups with whom the project most effects. Although it could be said all operational staff at Pepper maybe impacted by system’s implementation and process change.

### Table 3.1

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Stakeholder Group** | **Benefits** | **Attitudes** | **Important Features** | |
| Business Owners | * More competitive. * Additional service offerings. Ability to perform new tasks. * Scalability, allows expansion. * Cost savings. | Positive | * Database. * Reporting. |
| Campaign Managers | * Improved productivity. * Reduced rework and wasted effort. * Automation of manual ‘repetitive/undesirable’ tasks * Improved usability, easier to do things. | Positive/ambivalence | * Call List administration. * Database. * Search. |
| Telemarketers | * Improved productivity. * Reduced rework and waste. * Improved usability, easier to do things. | Positive | * Call making screen. * Search. |
| Clients | * Possible savings, or better quality of end result. | Unknown | * Reporting. |

## 3.2 Project priorities

For all features to be part of the first release, a ranking has been made as to determine which parts of the system are most critical, although all are required for the first release. This is design to help understand where the most effort/resources should be spent.

### Table 3.2

|  |  |
| --- | --- |
| **Feature** | **Priority** |
| Administration | 5 |
| *Upload Database* | *9* |
| Upload Call List | 1 |
| Edit Call List | 3 |
| View Call List | 8 |
| Search Contacts | 7 |
| Review Call Outcomes | 4 |
| Generate report | 6 |
| Make Call | 2 |

The priorities of the project can be helpfully categorised as per the below table :

**Driver**: A significant success objective with limited flexibility for adjustment.

**Constraint**: A limiting factor within which the project manager must operate.

**Degree of freedom**: A factor that the project has some latitude to adjust and balance against the other dimensions.

### Table 3.3

|  |  |
| --- | --- |
| **Priority** | **Category** |
| Features | Driver |
| Quality | Driver |
| Schedule | Driver |
| Cost | Constraint |
| Staff | Degree of Freedom |

## 3.3 Deployment considerations

The expectation is for the application to use a web based client – server architecture. Where most of the processing is done on the server side and pushed out to a web page in a browser which presents a front end GUI. This means the system is accessible from anywhere via web browser and the appropriate log on credentials. It will be assumed that the system is to use Melbourne, Australia locale time format when presenting data to the front end GUI. However, no requirement is placed on the user as to which time zone they choose to operate from. Currently a mobile version, i.e. a port to phones and tablets is not a requirement. It may be added to a future releases.

The important infrastructure to consider in deployment is the cloud service provider, the capacity, network access and data storage aspects of the system. The system must scale to handle multiple users using the front GUI. This could from vary from 1 to 100 users or even more. The expectation is more compute capacity is leveraged from the cloud service provider as users increase. This applies to data requirements, which may start small but expand rapidly if multiple clients are configured and their respective databases uploaded to the system.

The expectation for training when deployed is that the system will be inherently usable enough that no built in help shall be required. Only a short training session for new users should be enough to provide context and have them navigate the system efficiently.

Appendix A Context Diagram (data flow)

Client

Create EDM’s

Review Call Outcomes

Generate Reporteport

Create Databaseeport

Create Questions

Make Call

Show Record

Search Contact

Create Telemarketer

Create Campaign

Create Client

Create/Edit Call List

Telemarketer

Show Call List

Campaign Manager

Pepper Telemarketing System