Project Charter

CRM for a food innovation consulting business (P000337CSITCP)

Project mentor: Sumedh Shriram

Group members:

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Terminologies:

- “Client”: Food Entrepreneurship Academy
- “Customer”: Food Entrepreneurship Academy’s customers

1. Project Purpose

Food Entrepreneurship Academy(FEA), is a consultancy company, offering innovating solutions to early stage food entrepreneurs and food manufacturing start-ups. With many leads and a long sales cycle, it has always been difficult to keep track of clients, leads and potential clients which most of the time have gone cold. Currently, the company is handling all the leads manually by writing them in a diary, which can be hard to even track them and even hard for growing team members to manage them efficiently.

So, the CEO of the company has requested for a Customer Relationship Management(CRM) to be developed which will enable the company to better monitor stages of sales cycle - Prospecting, Lead Qualification, Initial Meeting, Proposal, Deal Closure, and Project Progress. This would enable more efficient handling of the opportunities and keeping track record of potential and former clients.

2. Project Objectives

For company who want to keep track of the progress of the sales cycle and maintain relationship with the client, the Customer Relationship Management(CRM) is a web based software that will allow sales team to keep an update of any kinds of leads and opportunities and show progress report to clients on each stages of the project execution. Unlike the current manual processes of diary entry of leads, the company using the CRM will not have to go through each and every record on diary to track the sales stages, and will save them time and will also increase efficiency within the team.

2.1 Objectives and Scope

The objectives of the CRM are as follows:

BO-1: Reduce time recording, retrieving, and filtering clients’ information to under 5 minutes per client.

BO-2: Improved project progress visibility for current clients. Clients can track public tasks as well as the overall progress of the project compared to the suggested timeline.

BO-3: Simplified creation, retrieval, and tracking of tasks within the organization to under 2 minutes per task.

Success Criteria/Metrics:

SM-1: At least 80% of the suggested scope is finished by the last sprint with a minimum viable product.

SM-2: Clients are surveyed with 60% satisfaction with the MVP.

The scope of CRM is as follows:

System access: Web application – responsive for both mobile and computers.

Feature -ID	**Feature Name**	**Description**
F-1	Login/Logout	All users can safely log in using email and a password
F-2	Account management	Create, delete, and assign roles to user accounts.
F-3	Customer information management	**Sales Team:** Create and Update Project Details **Sales Team:** Update Project Sales Cycle with its description and any attachments. Sales Cycle includes Prospecting, Lead Qualification, Initial Meeting, Proposal, Deal Closure. **Sales Team:** Assign Project Lead to one of the team members once deal is closed. **Admin:** Delete Project

F-4	Task management and delegation	**Hierarchy:**
		- [Project]:
		    - [Milestones]:
		        - [Tasks]:

		- [Assignees] **Team Member (Only Project Lead):** Add team members to the project and tag appropriate roles. **Team Member (Only Project Lead):** Create Milestones and Tasks for each milestone with Deadline and Status **Team Member (Only Project Lead):** Increase Deadline for a task **Team Member (Project Team Members):** Notify for task closure **Team Member (Only Project Lead):** Close a task after review **Team Member (Both Project Lead & Project Team Members):** Discussion Forum inside each task
F-5	Project Report	A comprehensive graph showing project progress with deadlines dates and status
F-6	Home page	A home page with quick actions for customer and task management features.

Out-of-scope:

Index	Out-of-scope features	Reason
1	Chat integration	Current means of communication through other platforms are sufficient.
2	Finetuning of project progress	Time constraints
3	OAuth – third party login	Time constraints
4	Forgot Password Options	Time constraints
5	Calendar View of tasks and deadlines	Time constraints

a. Major Deliverables

The following table presents the major deliverables that the project's product must meet in order for the project objectives to be satisfied.

Major Deliverable	**Deliverable Description**
Web-based Application	Features F-1, F-2, F-3 implemented

3. Overview

Feature Id	**Release 1**	**Release 2**	**Release 3**	**Release 4**
F-1: Login/Logout Implementation	Complete Login & Logout functionality	Fully Completed		
F-2 : Account Management	**Admin can:** Create, Read, Update and Delete (CRUD) for Sales Team Account, Project Team Members Account and Client Members Account.	Carry over, if anything is left	Fully Completed	
F-3 :Lead management	Not implemented	**Sales Team can:** Create and update Project Details Update Project Sales Cycle with its	Carry over, if anything is left	Fully Completed

		description and any attachments. Assign Project Lead to one of the team members once deal is closed. **Admin can:** Delete Project		
F-4: Task management	Not implemented	Not implemented	**Implemented only if time permits** **Team Member (Only Project Lead) can:** Add team members to the project and tag appropriate roles for the project. Create Milestones and Tasks of each milestones with Deadline and Status Increase Deadline for a task Close a task after review	**Implemented only if time permits** **Team Member (Project Team Members) can:** ~~Request~~ Notify for task closure **Team Member (Both Project Lead & Project Team Members):** Discussion Forum inside each task

F-5: Project Report for Client	Not implemented	Not implemented	Not implemented	**Implemented only if time permits** **Client can:** View only Project Milestone with Deadline and Status

4. Schedule : Agile WBS for the CRM

ID	Name	Predecessor	Due Date
1	**Release 1**		**28 April (W7)**
1.1	Login Page		
1.2	Logout Functionality		
1.3	Admin- Create, Read, Update and Delete (CRUD) for Sales Team Account	1.1	
1.4	Admin- Create, Read, Update and Delete (CRUD) for Project Team Members Account.	1.1	
1.5	Admin- Create, Read, Update and Delete (CRUD) for Client Members Account.	1.1	
2	**Release 2**	**1, 2**	**2 June (W12)**
2.1	Sales Team: Create and Update Project Details	1.3	
2.2	Sales Team: Update Project Sales Cycle with its description and any attachments. Sales Cycle includes Prospecting,	2.1	

	Lead Qualification, Initial Meeting, Proposal, Deal Closure.		
2.3	Sales Team: Assign Project Lead to one of the team members once deal is closed.	2.2	
2.4	Admin: Delete Project	2.1	
3	**Release 3**	**2**	**Implemented only if time permits**
3.1	Team Member (Only Project Lead) can: Add team members to the project and tag appropriate roles for the project.	2.3	
3.2	Team Member (Only Project Lead) can: Create Milestones and Tasks of each milestones with Deadline and Status	2.3	
3.3	Team Member (Only Project Lead) can: Increase Deadline for a task	2.3	
3.4	Team Member (Only Project Lead) can: Close a task after review	2.3	
4	**Release 4**	**1, 3**	**Implemented only if time permits**
4.1	Team Member (Project Team Members) can: Notify for task closure	3.1	
4.2	Team Member (Both Project Lead & Project Team Members): Discussion Forum inside each task	3.1	

4.3	Client can: View only Project Milestone with Deadline and Status	1.5	

5. Stakeholders

Stakeholder	Major value	Major Interest	Constraints
Admin (Co-founders)	Efficiency, growth, scalability, data organization, business development.	Streamlining operations, improving sales processes, fostering team collaboration, tracking business growth.	Limited resources (time, budget), need for seamless integration with existing systems, ensuring data security and privacy compliance.
Sales Team	Closing deals, client satisfaction, team collaboration, meeting targets.	Having a centralized platform for lead management, ease of tracking sales progress, efficient communication within the team, achieving sales targets.	Learning curve for new systems, time constraints due to manual processes, need for user-friendly interface.

Project Team Lead	Project success, team productivity, meeting deadlines, effective communication	Clear task allocation, milestone tracking, efficient team coordination, timely task completion.	Balancing multiple projects, ensuring team members are aligned with project goals, addressing any conflicts or bottlenecks.
Project Team Members	Contribution to project success, collaboration, skill development.	Clearly defined tasks, understanding project goals, contributing effectively to project milestones, learning opportunities.	Balancing workload across multiple projects, communication challenges, ensuring alignment with project lead's instructions.
Client	Project transparency, timely delivery, quality service, value for money.	Regular project updates, clear communication channels, meeting project milestones, achieving desired outcomes.	Time constraints on their end, budget limitations, need for clarity on project progress and deliverables.

Internal stakeholders:

Product Owner: Jagulan Srikaran

Scrum Master: Chenxing Zhou (Jason)

Scrum Team: Shiyuan Sun (Calvin), Chenxing Zhou (Jason), Hoang Nguyen (Austin), Jagulan Srikaran, Abhinav Manohar

6. Risk Management

a. Assumptions

AS-1: Training will be provided to the sales team and project team members in order to use the web application properly.

AS-2: In order to keep the clients in loop, the Project Team Members need to keep updating the progress of the project by updating the status and deadlines of milestones and its tasks.

b. Dependencies:

DE-1: At the launch of the project, the details of the the current and former clients in the diary where they have worked manually needs to be fed in the system.

c. Risks:

Risks	Contingency Plan
Technical problems or system failures that hinder CRM functionality and operations.	● Perform routine system maintenance and testing to detect and resolve potential problems before they affect users or disrupt business operations. ● To reduce downtime and disruptions to business operations, have a dedicated IT support team or external service provider available to troubleshoot and resolve technical issues as soon as possible.
Data breaches and privacy concerns caused by unauthorized access or cyber attacks.	● Implement strong security measures, including encryption, firewalls, access controls, and regular audits, to safeguard sensitive CRM data. ● Prepare a data backup and recovery plan to reduce the impact of any data breaches or system failures, including regular backups of critical data.

c.) The meeting minutes (W2 & W3)

Week 2:

Sprint planning
Sprint planning notes: Date:14/3/2024 Attendee

- Todos this week:
  - Send an email asking for guidance from the RMIT mentor (Jagulan) – meeting with the mentor
  - Follow up email with the industry partner (Jagulan)
  - Create a Jira/Trello project and add everyone (Chenxing)
  - Create a Github repo & Gitflow collaboration schema (Shiyuan)
  - A description of the backend architecture and delivery platform (Team) (Abhinav - Shiyuan do some research)
  - (Pipedrive, Agile CRM, Hubspot CRM)
  - Project charter (Hoang start the doc)
    - Description
    - User stories
    - Timeline
    - Tools & technologies

Week 3:

- Expand on both options:
  - Building from scratch
  - Looking for platforms
- Meeting agenda
- 50% doc, 50% technical side
- Focus on the submission document.
- Work out a meeting schedule with Sumedh
- Follow up with Sumedh

The client wanted a clearly visible prototype and a usable product.

Client Pain Points:

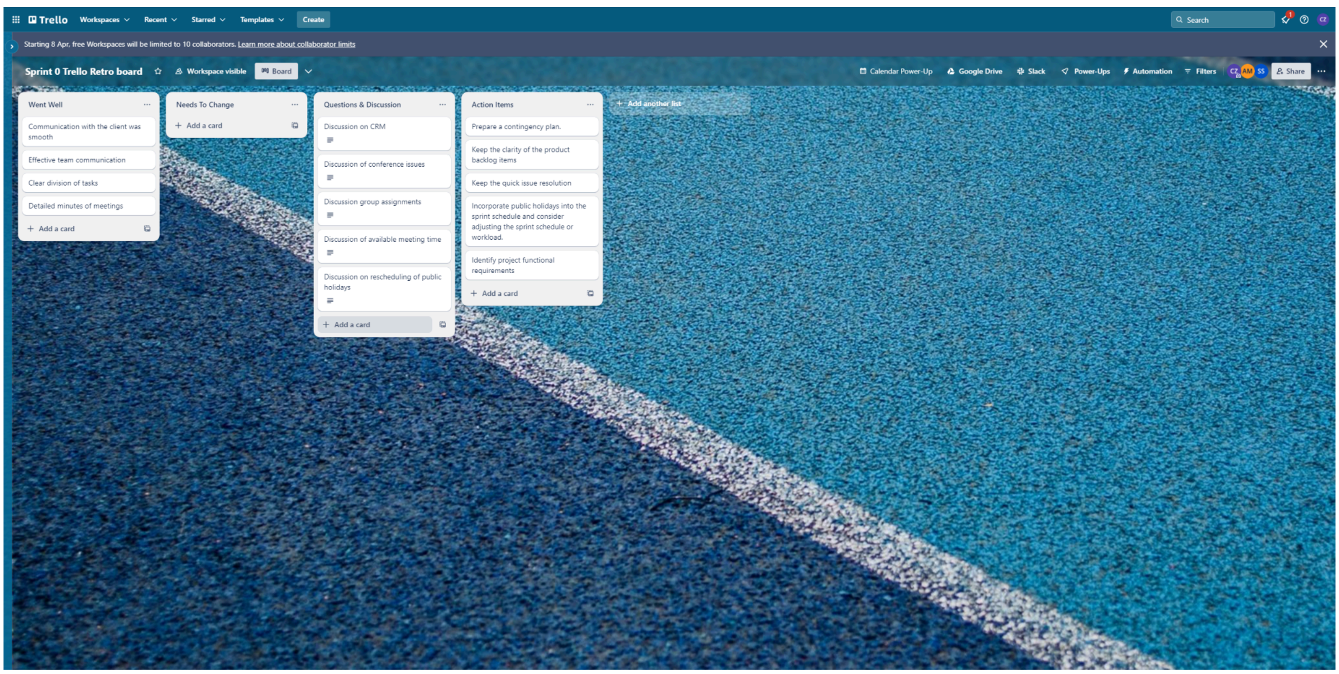
- Working simultaneously with 20+ clients at the same time -> difficulty tracking and vesting all clients
- The business is growing very quickly, more clients need their services, but they are having problem scaling
- Focus is no longer on looking for new clients
  Is there a requirement for a programming language if we need to start from scratch?
- Customer is not tech-savvy

d) **Project Infrastructure Summary:**

i) Name of the Canvas Project Group: SS-337-crm-food

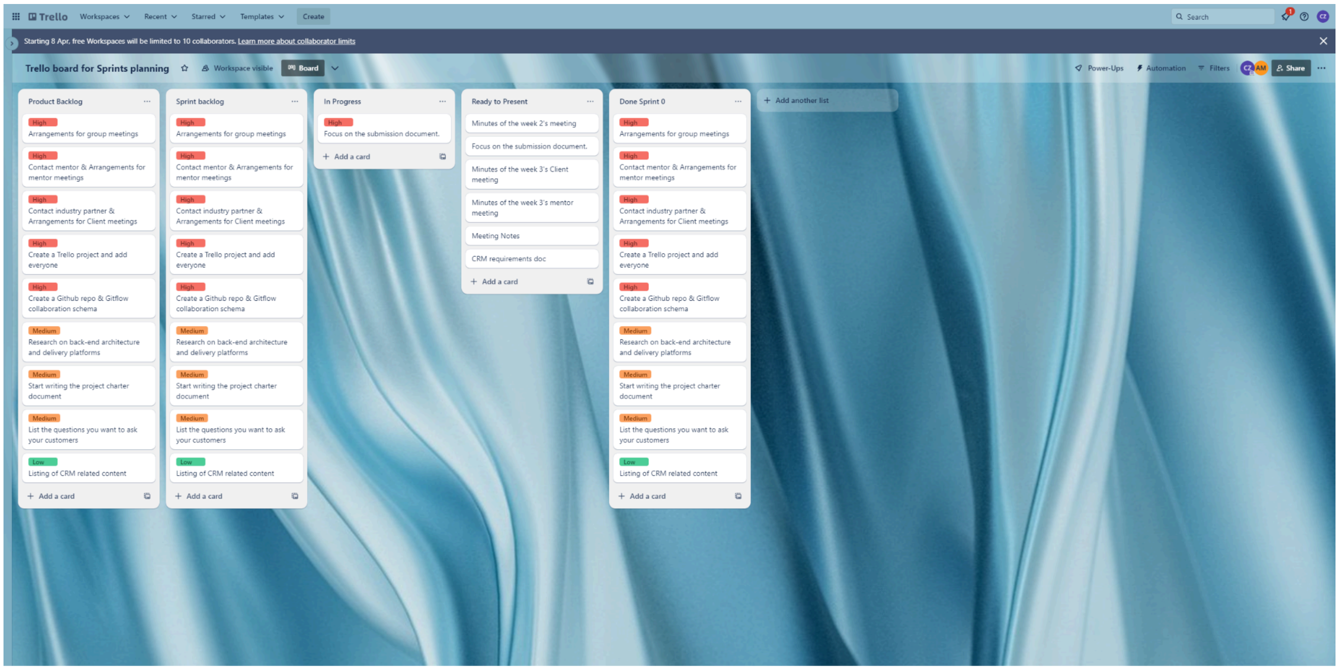
ii) Sprint 0 Trello Retro board:

https://trello.com/invite/b/2gAtmJ3L/ATTI61fbed8a79f882076d19886d2b4c704eE7812B72/sprint-0-trello-retro-board



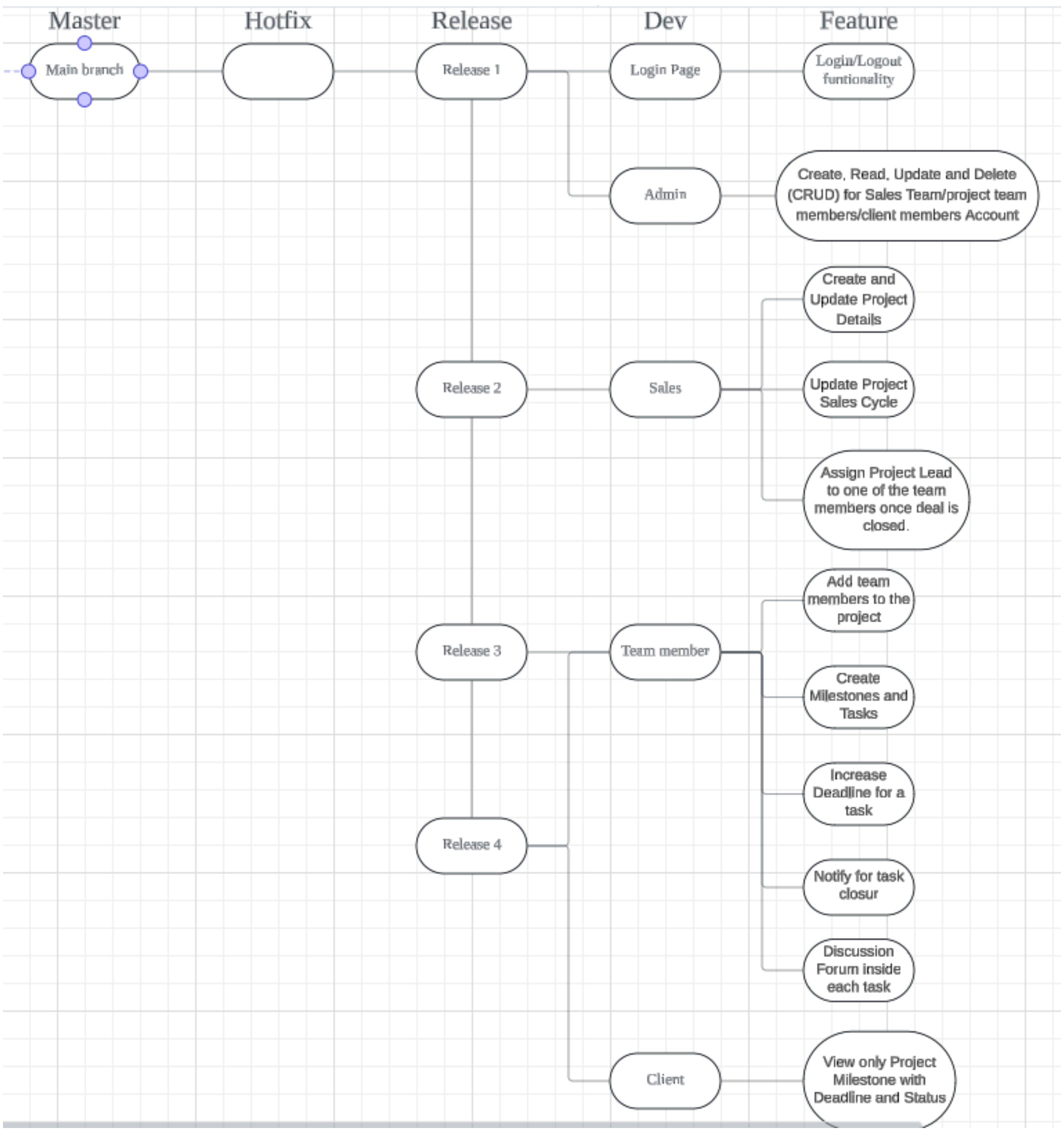
Trello board for Sprints planning：

https://trello.com/invite/b/mgSpqv8B/ATTI50adcef912e181681b04d4f093440ddbAA7A6785/trello-board-for-sprints-planning

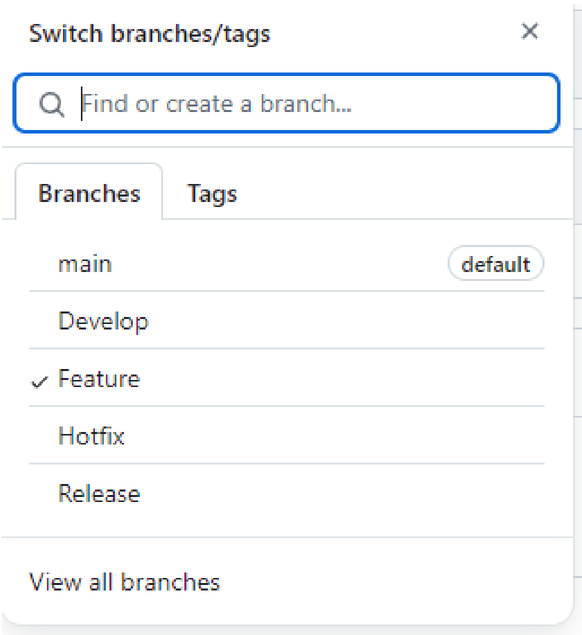


iii) Github repo- **https://github.com/CalvinSSSSSS/CRM_Project.git**

Gitflow diagram:



Gitflow branches:



iv) Document Management Repository: https://teams.microsoft.com/_#/school/FileBrowserTabApp/%E5%B8%B8%E8%A7%84?threadId=19:dFzs3ZOUTIoL4MFjaCstK5etoxT8LIWSVO1c6GMw2hY1@thread.tacv2&ctx=channel

v) A description of the backend architecture and development/delivery plat-forms:

While there's consideration for adopting an existing CRM platform that suits FEA's needs, the current approach leans towards building a software solution from scratch. This decision is pending further consultation with our mentor, who will provide guidance on the best course of action.

The **front-end** of the CRM system will be developed using HTML, CSS, and JavaScript for a responsive design and TypeScript for improved code reliability. This streamlined approach ensures a user-friendly interface while maintaining code quality.

The **backend** of the Food Entrepreneurship Academy's CRM system will use AWS, which is a platform that offers online services for businesses, to ensure it runs smoothly and can handle growth. We'll use AWS's database service to organize and manage information about clients and sales efficiently, and AWS's server service to run the application's operations. The database will use MySQL, a tool known for safely storing and retrieving data. For the system's core operations, we're using Java with a tool called Spring Boot, making it quicker and easier to get the system up and running while also making sure it's secure and can easily connect to other services. To ensure the website and the backend communicate without issues, we'll set up a system using RESTful API, a set of rules that allows the two to exchange information securely, handling tasks such as managing data about leads and clients, and making sure only authorized users can access certain information.

On the **development and delivery** side, the project will utilize GitHub, a platform that allows the team to work together on coding projects and keeps track of all changes. This setup supports the automatic testing and updating of the system on AWS, ensuring any code changes don't cause problems. TypeScript will be used in building the website's interface to make the code more reliable and easier to manage, especially important as the project grows. Combining these tools and strategies provides a solid foundation for developing, deploying, and updating the CRM system efficiently, ensuring it meets the needs of the Food Entrepreneurship Academy and its users.