

# **Project Summary Statement**

## **Project Name: Lead Finder Application**

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### **1.0 Project Scope Statement**

*This project will develop the Lead Finder Application for IMEX Cargo, leveraging the Zoho Creator platform. The project aims to enhance the efficiency of lead generation processes by incorporating a detailed search engine capable of using customizable criteria for targeted lead identification. The anticipated project completion timeframe is three months from initiation, This project should not cost anything to develop, as we intend to use open-source tools.*

- *Key deliverables to be developed as part of this project include:*
- *A user-friendly application interface within Zoho Creator, allowing for easy access and utilization by IMEX Cargo team members.*
- *Search functionality that enables keyword entry, location specification, and radius setting for lead searches.*
- *Integration of comprehensive search criteria, including filters for industry, company size, revenue, and other relevant parameters to refine search results.*
- *Real-time updates feature to provide current information on new leads matching user-specified criteria.*
- *Customizable reports generation functionality, allowing for the export of lead data in formats such as CSV and Excel.*
- *Seamless integration with Zoho CRM to ensure efficient import/export of lead data for further management and follow-up.*

## **2.0 Acceptance criteria**

*For the successful acceptance of the Lead Finder Application:*

- *The application must be fully functional within Zoho Creator, adhering to the specified project features.*
- *The search engine should allow users to set detailed criteria, including industry and location, with effective geolocation capabilities.*
- *Integration with current databases and Zoho CRM must be seamless, enabling accurate lead management and data transfer.*
- *Real-time update functionality and customizable report generation must meet specified standards.*
- *The project must be completed within the Three-month timeline with no costing.*
- *Compliance with data security and privacy standards is mandatory.*

*Final acceptance will be based on Michelle DeFronzo's confirmation that these criteria have been met satisfactorily.*

## **3.0 Project boundaries or exclusions**

*Project Boundaries or Exclusions:*

- *Development limited to Zoho Creator; other platforms excluded.*
- *Only integration with existing databases included; database creation/sourcing excluded.*
- *No hardware upgrades provided.*

## **4.0 Project constraints**

*The primary limitation for this project is the firm deadline of June 30th, which must be strictly adhered to, as there is no possibility of extending the project timeline beyond this date. Furthermore, the project has no allocated budget, necessitating the exclusive use of open-source or complimentary resources throughout its duration. The detailed constraints are outlined as follows:*

- *The project must reach completion by June 30th.*
- *All project costs must be kept to an absolute minimum.*
- *The sponsor can authorize all project-related expenditures.*
- *Design proposals require the sponsor's formal approval prior to the commencement of development.*

## **5.0 Project Budget**

*The sponsor has indicated that there is no designated budget for this project, and it is expected to incur minimal costs. Wherever feasible, the utilization of open-source or complimentary resources is encouraged. Costs that may arise in the future, fall beyond the purview of this project's current scope. Any expenses that do arise will require the direct authorization of the Project Sponsor.*

## **6.0 Project Change Management Plan**

*The Change Management Plan for the Lead Finder Application project for IMEX Cargo outlines procedures for handling scope changes. Any stakeholder can submit a Change Request Form, which is then reviewed by the Change Control Board (CCB) to assess its impact on project objectives, timeline, and budget. The CCB decides whether to approve, reject, or defer the change request, communicating the decision and any adjustments to stakeholders. Roles and responsibilities are defined, and all change-related documentation is recorded in a centralized Change Log. Approved changes are implemented by the project team, with the process regularly reviewed for improvement.*

## Stakeholder analysis

stakeholder Position/Role	Type of Stakeholder	Stakeholder Expectation(s)	Stakeholder Interest(s)	Influence on Project Result
IMEX Cargo Management	Internal	Efficient lead generation processes; Effective use of resources; Timely project completion	High	High
Zoho Creator Developers	External	Successful integration of Lead Finder Application with Zoho Creator platform; Positive user experience	High	Medium
IMEX Cargo Sales Team	Internal	User-friendly interface; Comprehensive search functionality; Seamless integration with Zoho CRM	High	Medium
Project Manager	Internal	Clear communication; On-time delivery of project milestones; Adherence to budget	High	High
End Users	Internal	Easy access and utilization of the application; Relevant and accurate lead data	Medium	Medium

Position in the Organization or Role in Project	Internal or External	High Level Needs or Expectations for the Project/Product	High/Med/Low	Supporter/Opposed/Neutral	Strategies and Tactics
IMEX Cargo Management	Internal	Support for efficient lead generation processes; Clear communication channels; Regular progress updates	High	Supporter	Regular stakeholder meetings; Highlight project milestones and achievements; Address concerns promptly
Zoho Creator Developers	External	Successful integration with Zoho Creator; User-friendly design;	High	Supporter	Regular communication on project progress; Incorporate

		Opportunity for collaboration and feedback			developer feedback; Provide necessary resources and support
IMEX Cargo Sales Team	Internal	User-friendly interface; Seamless integration with Zoho CRM; Training and support for application use	High	Supporter	Involve in user acceptance testing; Provide comprehensive training sessions; Address feedback and concerns
Project Manager	Internal	Clear communication; Timely decision-making; Addressing risks and issues promptly	High	Supporter	Establish clear communication channels; Regular status updates to stakeholders; Risk mitigation planning
End Users	Internal	Easy access to application; Relevant and accurate lead data; User training and support	Medium	Supporter	Involve in user acceptance testing; Provide user-friendly documentation and training materials; Gather feedback for continuous improvement

## Project Milestones

Milestone / Phase	Start Date	End Date	Status	Progress
Project Initiation	April 15	April 30	Completed	Project objectives and scope defined; Stakeholder analysis conducted; Initial project plan created.
Development Phase 1	May 1	May 15	In Progress	User interface design finalized; Search functionality development initiated; Initial integration with Zoho Creator platform started.
Development Phase 2	May 16	May 31	Planned	Implementation of comprehensive search criteria and filters; Real-time updates feature development; Integration with Zoho CRM initiated.
Testing and Quality Assurance	June 1	June 15	Planned	User acceptance testing scheduled; Bug fixing and optimization; Performance testing to ensure scalability and reliability.
Deployment and Launch	June 16	June 30	Planned	Final adjustments based on testing feedback; Training sessions for IMEX Cargo team members scheduled; Deployment plan finalized

## Resource Needs List

Resource Type	Description	Date / Duration	Approval From	Approval Secured?	Resource Confirmed?
Conference Room	Need conference room to provide training for X	3 days	Sally Supervisor	October 15, 2013	Yes, room is booked in corporate calendar
Developers	Additional developers for project implementation	As needed	Project Manager		Yes
QA Analysts	Quality assurance analysts for testing phase	As needed	Project Manager		Yes
Project Manager	Experienced project manager to oversee project	Full duration			Yes
Business Analyst	Business analyst for requirements gathering	Full duration			Yes

## Project Risk Analysis

#/ ID	Risk Statement	Impact	Probability	P&I Rating	Risk Owner	Response Strategy
1	Due to complex integration requirements, the implementation of geolocation functionality might face delays, impacting the project timeline.	High	Moderate	High	Project Manager	Mitigate – Allocate additional resources to the geolocation integration task and closely monitor progress to identify and address any potential delays proactively.
2	Inaccurate or incomplete company data from external databases or APIs could lead to ineffective lead searches and reduced application usability.	Moderate	High	High	QA Analyst	Mitigate – Conduct thorough testing of data integration processes and establish data validation mechanisms to ensure the accuracy and completeness of company data.
3	Users may encounter difficulties in navigating the user interface, leading to frustration and decreased user adoption rates.	Moderate	Moderate	Moderate	UX Designer	Mitigate – Conduct user testing sessions to gather feedback on the interface design and make necessary improvements to enhance usability and user experience.
4	Technical issues or compatibility issues with Zoho CRM integration could disrupt the seamless transfer of lead data, impacting data integrity and workflow efficiency.	High	Low	Moderate	IT Specialist	Mitigate – Conduct thorough compatibility testing between the Lead Finder application and Zoho CRM to identify and resolve any potential issues prior to deployment.

5	Insufficient training and support resources for end-users may result in underutilization of the application's features and functionalities.	Moderate	Moderate	Moderate	Training Coordinator	Mitigate – Develop comprehensive training materials and conduct training sessions for end-users to ensure they are proficient in using the application effectively.
6	Dependency on external factors such as API availability and service downtime may impact the reliability and performance of the Lead Finder application.	High	Moderate	High	Project Manager	Mitigate – Establish backup plans and alternative solutions to mitigate the impact of external dependencies on the application's functionality and performance.

## Communication Plan

Stakeholder	Message	Purpose	Frequency	Method
Project Manager	Project Status Update	Inform about project progress	Weekly	Email using project status template
Development Team	Task Assignments	Assign tasks and clarify requirements	As needed	Project management tool (e.g., Jira)
QA Analysts	Testing Updates	Report testing progress and issues	Bi-weekly	Meeting or email depending on urgency
Business Analyst	Requirement Clarifications	Clarify requirements and priorities	As needed	Meeting or email depending on urgency
Project Sponsor	Project Review Meeting	Review project progress and decisions	Monthly	In-person or virtual meeting