Level 1		brillianCRM			
Level 2	CRM Strategy	Software	Data	Handover/ Documentation	Project Management
Level 3	Sales Force Analysis	Requirements Specification	Data Analysis	Testing	
	Customer Analysis	Functional Requirements	Data Model Creation	Training	
	Actual State Analysis	Development in India	Creation of Migration Concept	Approval	
	Target State Analysis	Implementation (testing environment)	Data Migration		
	Process Analysis	Implementation (live system)			
	Determination of Mobile Devices	Pilot Running			
	Design Customer Relaitonship Strategy	Roll-out			
	Process Adaptation				

Project name:	Work package title:
brillianCRM	1.1 Sales Force Analysis

Work package description:

During the sales force analysis every fact of a sales cycle is analyzed. This could be the number of customers acquired by each sales person, or the amount of sold products of each type. Therefore, it not only takes a look at the customers but also at other sales factors.

Aim of work package:

To be able to position the company in its sales force towards other companies.

Predecessor:	Successor:
Scheduling	Design customer relationship strategy

Duration:	Effort in man days (MD):
15 days	6 MD

Responsible person(s):

2 Consultants

Additional information:

Project name:	Work package title:
brillianCRM	1.2 Customer Analysis

Work package description:

As the scope of the project is to develop a customer relation system, it is necessary to take a closer look at the number of customers, data of customers, and customer behavior. This will help to make key business decisions involving this new software, and it can also support predictive analytics. The customer analysis is part of the actual state analysis.

Aim of work package:

- Overview of number of customers and customer hierarchies
- Customer master data
- Customer behavior

Predecessor:	Successor:
Scheduling	Design customer relationship strategy

Duration:	Effort in man days (MD):
10 days	18 MD

Responsible person(s):

2 Consultants, project assistant

Additional information:

Project name:	Work package title:
brillianCRM	1.3 Actual State Analysis

Work package description:

In order to get a good overview of the actual situation, an actual state analysis is performed. This includes e.g. the customer analysis, the process analysis, the sales force analysis, and the data analysis.

Aim of work package:

Overview of the actual state of sales structures and processes.

Predecessor:	Successors:
Scheduling	Functional requirements, design customer relationship strategy, process adaptation

Duration:	Effort in man days (MD):
25 days	264 MD

Responsible person(s):

Project manager, assistant, 2-5 consultants, 2 IT specialists

Additional information:

Project name:	Work package title:
brillianCRM	1.4 Target State Analysis

Work package description:

The target state analysis describes the requirements of the CRM system in a customer perspective based on the actual state analysis. The All knowledge gained is defined in a companywide construct. It is very important to include all stakeholders as current visions and strategies are built, on which the company has to align after the roll-out of the CRM system. All strategies have to be documented properly.

Aim of work package:

- Achieve an overview of the requirements of the customer

Predecessor:	Successors:
Actual state analysis	Design customer relationship strategy, process adaptation, data model creation, creation of migration concept, functional requirements

Duration:	Effort in man days (MD):
20 days	1056 MD

Responsible person(s):

Project manager, 13 consultants, 2 IT specialists

Additional information:

Project name:	Work package title:
brillianCRM	1.5 Process Analysis

Work package description:

The process analysis takes a closer look at master data that is involved in the processes, persons that execute that process, and the sequence of the process itself. It serves to be able to find strengths and weaknesses of the process and also to compare and benchmark the process to other processes. Furthermore, it can serve as a documentation for the company.

Aim of work package:

- Process sequence, master data, involved resources
- Basis for comparisons
- Basis for process improvements

Predecessor:	Successors:
Scheduling	Functional requirements, process adaptation

Duration:	Effort in man days (MD):
25 days	200 MD

Responsible person(s):

Project manager, 5 consultants, 2 IT specialists

Additional information:

Project name:	Work package title:
brillianCRM	1.6 Determination Mobile Devices

Work package description:

In the planning phase it is necessary to determine on which devices the CRM system should work. As sales employees are travelling a lot to customers, it can be very helpful to access the customer relevant data on mobile, tablet, and laptop devices.

Moreover, attention has to be paid to the trend "bring your own device," which allows employees to use personally owned mobile devices for their work with access to privileged company information and applications.

Aim of work package:

To determine where the CRM system is needed.

- PC
- Laptop
- Mobile
- Personal digital assistant (PDA)

Predecessor:	Successor:
Scheduling	None

Duration:	Effort in man days (MD):
5 days	8 MD

Responsible person(s):

Project assistant, 2 consultants, IT specialist

Additional information:

Project name:	Work package title:
brillianCRM	1.7 Design Customer Relationship Strategy

Work package description:

The task of the creation of a customer relationship and strategy is to consolidate the relevant information gained in the target state analysis to a consistent concept which presents the main development parameters of the CRM system.

Components of the customer relationship strategy and structure are to define aims along the CRM success chain, to design the customer contact strategy, to compose a customer oriented management concept, and to create a multi-channel strategy.

Aim of work package:

- Design a customer relationship strategy and structure

Predecessors:	Successor:
Sales Force Analysis, customer analysis	Process adaptation

Duration:	Effort in man days (MD):
10 days	35 MD

Responsible person(s):

Project manager, 4 consultants, 2 IT specialists

Additional information:

Project name:	Work package title:
brillianCRM	1.8 Process Adaptation

Work package description:

After all company processes are gathered in the process analysis, the elicitation and subsequent adaption of the involved processes follows. These depend essentially on the customer relation strategy.

Process adaption describes the optimization of the processes according to the components quality, time and costs.

Aim of work package:

- The processes should be adapted in order to achieve individual or economical profits for the customer or the company
- The result of a process adaption is to gain a complete overview of the new adapted and defined CRM core processes

Predecessor:	Successor:
Process analysis, design customer relationship strategy	None

Duration:	Effort in man days (MD):
20 days	90 MD

Responsible person(s):

4 consultants, 1 IT specialists

Additional information:

Project name:	Work package title:
brillianCRM	2.1 Requirements Specification

Work package description:

The requirements specification is an essential task that has to be performed at the beginning of a CRM project. It aims to identify all functional and non-functional requirements to be implemented in the CRM system. This gives the project manager an overview of all requirements. The next task would be to limit all requirements to the project scope and prioritize each requirement.

Aim of work package:

- Definition of functional and non functional requirements the CRM software has to have
- Categorization of functional requirements in different groups

Predecessor:	Successors:
Define responsibilities	Preliminary budget estimations, milestone planning

Duration:	Effort in man days (MD):
5 days	5 MD

Responsible person(s):

Project manager

Additional information:

The identification of requirements can be performed in form of a workshop.

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Project name:	Work package title:
brillianCRM	2.2 Functional Requirements

Work package description:

The functional requirement includes the developed realization concept created by the supplier. It describes the realization of the requirements specification of the customer. The requirements are detailed and specified; moreover it includes a rough concept, and further general information of the planned system.

The functional requirement serves as an agreement between supplier and customer and has to be complete and consistent.

Aim of work package:

Content of the functional requirement is:

- Aims which should be achieved with the product (must/ shall/have criteria)
- Product use
- Product overview
- A description of the product landscape
- Product functionalities
- Processing product data from the system
- Product achievements
- Functional and non-functional requirements
- A testing description
- Development environment
- Special requirements for the system

Predecessor:	Successors:
Process analysis	Development in India, implementation of test environment

Duration:	Effort in man days (MD):
15 days	30 MD

Responsible person(s):

Project Manager

Project name:	Work package title:
brillianCRM	2.3 Development in India

Work package description:

Development takes place during the project execution according to the customer's confirmed requirements. It is performed in India in order to save salary costs for programmers.
Development defines the programming of the CRM software in a specific language like (Phythos, Java, C++)

Aim of work package:

Develop CRM software according to customer's requirements

Predecessor:	Successor:
Functional requirements	Testing

Duration:	Effort in man days (MD):
40 days	220 MD

Responsible person(s):

10 IT specialists

Additional information:

Project name:	Work package title:
brillianCRM	2.4 Implementation (test environment)

Work package description:

The CRM system is implemented into the testing environment to test the system regarding usability, error, functionalities, compatibility with other systems and performance. This includes three steps:
Installation: The CRM software is installed on the hardware component of the company.
Integration: The CRM software is integrated into the existing system landscape
Customizing: The CRM software is customized according to individual requirements.

Aim of work package:

- Use the test environment to find discrepancies

Predecessor:	Successor:
Functional requirements	Testing

Duration:	Effort in man days (MD):
3 days	108 MD

Responsible person(s):

5 consultants, 2 IT specialists

Additional information:

Project name:	Work package title:
brillianCRM	2.5 Implementation (live system)

Work package description:

The implementation of the software on the live system can be performed after successful testing in a testing environment. As soon as the software is implemented, the roll-out of the CRM software takes place and users can start working on the live system.

Aim of work package:

Implement the working software on the live system environment

Predecessors:	Successors:
Data migration, testing	Training, pilot running

Duration:	Effort in man days (MD):
5 days	30MD

Responsible person(s):

Consultant, 5 IT specialists

Additional information:

Project name:	Work package title:
brillianCRM	2.6 Pilot Running

Work package description:

After the creation of the prerequisites for the implementation of the CRM system, the pilot phase can help to get feedback on the system regarding usability, errors, functionalities and performance. As this is a very important process step in the project execution, it is very important to choose a department with motivated and competent employees. Moreover, customers are affected because external functions are also implemented in this step. All conspicuous features as well as recommendations have to be documented properly to ensure further adjustments in cooperation with the supplier.

For a successful pilot phase it is needed to:

- Distribute responsibilities
- Conduct reporting
- Analyze the information
- Check the information according to the requirements specification

Aim of work package:

- To get feedback on usability, fault/error, functionalities and performance

Predecessor:	Successor:
Implementation (live system)	Roll-out

Duration:	Effort in man days (MD):
10 days	198 MD

Responsible person(s):

5 consultants, 2 IT specialists

Additional information:

Project name:	Work package title:
brillianCRM	2.7 Roll-Out

Work package description:

During the roll-out, access to the CRM system is now expanded to the whole company. All affected employees are now involved. As all departments are affected by the roll-out, it is recommended to use a departmental procedure. Moreover, it is important to customize authorization in order to provide extra functionality to the employees who need it.

For a successful roll-out the following procedure should be used:

- Provision of functionality to the remaining users

- Training

- Intensive assistance for users

- Documentation of problems

- Analysis of the information and problem solving

Aim of work package:

- Adoption of the live operation after a successful pilot running in the whole company

Predecessors:	Successor:
Training, pilot running	Approval

Duration:	Effort in man days (MD):
20 days	42 MD

Responsible person(s):

Project manager, project assistant, 4 IT specialists, 1 consultant

Additional information:

Project name:	Work package title:
brillianCRM	3.1 Data Analysis

Work package description:

The data analysis is an extension to the process analysis taking a closer look at any data relevant to the project (especially master data). It is essential to the project because it is necessary to know which data and how much data has to be migrated into the new system for the next steps in the project.

Aim of work package:

- Identify relevant data to the project (e.g. master data)
- Evaluate what data needs to be migrated into the new software

Predecessor:	Successor:
Scheduling	Data model creation

Duration:	Effort in man days (MD):
8 days	40 MD

Responsible person(s):

3 consultants, 2 IT specialists

Additional information:

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Project name:	Work package title:
brillianCRM	3.2 Data Model Creation

Work package description:

The data model is created on the basis of the data analysis.
The complete data structure is created with the help of the supplier.
The data model includes topics like:

- Data storage (where and in which form shall the data be saved)

- Synchronization of the data (Is synchronization between the ERP and CRM necessary?)

- Data consistence and data integrity (deletion of multiple data)

- Maintenance (how to edit data and who has the administrative responsibility)

- Provision of interfaces (Are interfaces to other systems needed?)

Aim of work package:

- Creation of a data model which ensures a faultless data migration

Predecessor:	Successor:
Data analysis	Migration concept

Duration:	Effort in man days (MD):
8 days	40 MD

Responsible person(s):

4 consultants, IT specialist

Additional information:

Project name:	Work package title:
brillianCRM	3.3 Creation of Migration Concept

Work package description:

To identify which data and how the data should be integrated into the CRM system a migration concept is needed. First of all, it is necessary to define whether the data should be integrated manually or automatically through a migration tool.

Moreover, attention has to be paid to:

- Data redundancy

- Correctness and actuality of the data

- Identification and elimination of inherited waste

- Consistent and integrative migration

Aim of work package:

- Creation of a migration concept to ensure a faultless implementation

Predecessor:	Successor:
Data model creation	Data migration

Duration:	Effort in man days (MD):
5 days	50 MD

Responsible person(s):

Project manager, 7 consultants, 2 IT specialists

Additional information:

Project name:	Work package title:
brillianCRM	3.4 Data Migration

Work package description:

After the IT-infrastructure is installed, the data is migrated from legacy systems according to the migration concept into the new data model. Data is integrated into the CRM system while inherited waste should be revised. This is done within the activities of data cleansing and data harmonization.

Aim of work package:

- Migration of the data according to the data model and the migration concept

Predecessor:	Successor:
Creation of migration concept	Implementation of live system

Duration:	Effort in man days (MD):
15 days	45 MD

Responsible person(s):

5 consultants, 2 IT specialists

Additional information:

Project name:	Work package title:
brillianCRM	4.1 Testing

Work package description:

After the implementation of the CRM system in the test environment, testing can help to test the system regarding usability, errors, functionalities and performance. One department will test the system. As this is a very important process in the project execution, it is very important to choose motivated and competent users and IT specialists for testing.

Moreover, it is also possible to include customers into the testing phase to test not only the internal function of the CRM system but also the external functions. All conspicuous features as well as the recommendations have to be documented properly to ensure subsequent further adjustments in cooperation with the supplier.

Aim of work package:

- To get feedback on usability, errors, functionalities and performance

Predecessors:	Successor:
Implementation (test environment), development in India	Implementation (live system)

Duration:	Effort in man days (MD):
10 days	70 MD

Responsible person(s):

Project assistant, 4 consultants, 2 IT specialists

Additional information:

Project name:	Work package title:
brillianCRM	4.2 Training

Work package description:

For the end user as well as for the key user, it is really important to be able to work on the new system. Therefore, training has to be performed. Depending on the difficulty of the new software, the training can last a few days.

Aim of work package:

Train end users and key users to use the software adequately.

Predecessor:	Successor:
Implementation of the live system	Roll-out

Duration:	Effort in man days (MD):
20 days	180 MD

Responsible person(s):

13 consultants, project manager, project assistant

Additional information:

Project name:	Work package title:
brillianCRM	4.3 Approval

Work package description:

The approval closes the project. It can be performed by the Steering Committee or the customer. After the approval no more project work has to be performed.

Aim of work package:

- Approval of project
- Closing of project

Predecessor:	Successors:
Roll-out	Lessons learned, final project report, post cost analysis

Duration:	Effort in man days (MD):
2 days	225 MD

Responsible person(s):

Project manager, project assistant, 9 consultants, 4 IT specialists

Additional information: