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| Student Name: Breandan CunninghamStudent Number: D08113333Mobile Number: 0863275102 | **Stream (CSAA/SDIS/DKM/GP): SDIS** |
| Project Title:The development of a Client Relationship and Opportunity Management system within Microsoft SharePoint 2007. | |
| Summary (approx 200 words) The goal of this project is to utilise the collaboration, document management and workflow capabilities of Microsoft SharePoint services to successfully implement a Client Relationship and Opportunity Management System.  I see this project as being broken into three main areas. The first area is the integrated design of the CRM and Opportunity Management systems so that users see the SharePoint site as their main focal point for all business development purposes. This will rely heavily on the requirements analysis and business process mapping.  The CRM will hold the master list of all companies and contacts that any opportunity could arise from along with information critical to keeping a good relationship with that company or contact. From this the Opportunity Management system will act as a collaboration portal for all documents that are created throughout the opportunity life cycle with features such as major/minor versioning, check-in/check-out and approval.  Area two deals with the knowledge management of all data within the system. I hope to be able to show ways to efficiently store documents in the system related to companies, contacts and opportunities in a way that they are easily accessible again. This will include tagging documents with metadata and looking at ways of possibly auto tagging to reduce the amount of time spent by users uploading documents to the system. This area of the project will also attempt to increase visibility of the sales opportunity pipeline by using dashboards as a knowledge management tool.  Area three I see as the development of enhanced features and automating processes in the form of workflows such as linking documents to companies and opportunities, automatically creating sub sites when an opportunity reaches a critical stage in the life cycle. | |
| **Background (and References)**  This project spawned from ESBI’s Business Development department identifying the need to;  Their overall needs are to successfully:  Maintain all current companies and contacts that they come into contact with throughout their business.  Record and manage all possible opportunities.  To improve the level of reporting available to senior members of staff.  This should result in a better over view of the department, the processes in place and the opportunities currently in the pipeline.  In this instance opportunities are possible contracts or work that could be performed by ESBI in order to generate revenue.  It is my proposal to manage those opportunities from within a SharePoint environment as described through an opportunity life cycle.  To date these are the current texts and resources I have accumulated in order to help me achieve this.  Books   * Expert WSS 3 and MOSS 2007 Programming * Building the SharePoint User Experience * Professional Microsoft SharePoint 2007 Workflow Programming * Experience and Knowledge Management in Software Engineering * Rational Unified Process: Best Practices for Software Development Teams   Websites   * <http://www.cmswire.com/cms/> (Content Management) * <http://www.heathersolomon.com/blog/> (SharePoint) * <http://www.augustana.ab.ca/~mohrj/courses/2000.winter/csc220/papers/rup_best_practices/rup_bestpractices.html> (White paper on Rational Unified Process: Best Practices for Software Development Teams (White Paper) * <http://www.ambysoft.com/unifiedprocess/agileUP.html> (AUP) | |
| Proposed Approach Overall approach  My approach will either follow the Rational Unified Process or the Agile Unified Process depending on which better suit my needs and the system being developed. At this time I believe the Agile Unified Process is better suited due to its use of prototyping throughout the different stages.  Requirements phase  A lot of attention will be paid to the requirements analysis and business process mapping that will identify the workflow of the business development process, clearly indicating responsibility for all activities within a process. Once the processes are mapped I can then identify possible areas for improvement.  Initially I will hold talks with senior members of the Business Development team to discover what their requirements are. I would then map the current “as-is” process in the form of one more business process maps. This is because depending on the complexity of the processes, they may need to be expanded or viewed at a lower level. I will then create the “to be” process map with the help of senior members of staff where it has been agreed that their current processes need improvement.  I will also create the other relevant diagrams that are generated during the Rational Unified Process/Agile Unified Process that will help me map the new system.  Design Phase  An important factor during the design process will be to ensure that the users of the system have bought into the idea of using SharePoint as the main technology for their daily tasks. This will mean researching and showing ways a knowledge management system can benefit the organisation.  Implementation  I feel the Implementation of the basic SharePoint site should not be overly complicated provided I have successfully gathered the correct information. Where I have identified areas that could benefit from custom workflows, I will develop them using SharePoint designer in order to automate and improve efficiency in processes. I will be using the asp.net environment and c# to develop any pages or features that requires customisation.  Testing Phase  Two of the main areas of testing I will be focusing on are:  To ensure that all requirements have been correctly implemented. This will be through user acceptance testing, prototypes and usage scenario testing.  To identify and address defects in the system prior to the deployment of the software. This will be through black box testing. | |
| Evaluation Criteria This project will be evaluated on:   * The quality of research. * The quality of requirements analysis. * Overall system design. * Usability. * The quality of testing. * Project completeness. * The development of advanced & custom features. | |
| Deliverables  * Interim Report. * Project dissertation. * User manual. * A functioning system for Demonstration.   **Priority Features:**   * To upload and managing documents online. * To record company details. * To record contact details. * To record opportunities. * To progress opportunities to different stages of the opportunity lifecycle. * Use SharePoint as the focal point of the bid-screening meeting.   **Secondary Features:**   * Source code for the project. * Test data for demonstration. * Track communications to and from contacts/companies. * Reporting on opportunities through a dashboard. | |
| Technical Requirements Currently I believe my technical requirements for this project are:  A virtual server running  -Microsoft Server 2003.  -Microsoft SharePoint Services 3.0.  -Microsoft SharePoint Designer.  -Microsoft SharePoint Server 2007 SDK.  Other requirements that will most likely be needed near the end of the project are a small LAN and at least one client machine to log on to the SharePoint system. | |

## Project Plan

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| **October 2010:** Research  * Rational Unified Process * Agile Unified Process  Client Relationship Management SystemsData & Knowledge Management Requirements gathering and analysis of Business processes. | |
| **November 2010:** ResearchSharePoint ServicesDocument Management Systems Further analysis of business processes. | |
| **December 2010:**  Begin work on the layout of the SharePoint site.  Begin to code areas of the site.  Documentation of where the system may have to be changed. | |
| **January 2011:**  Begin testing parts of the system.  Continue to work on other areas of the system.  Last chance for changes in the layout of the system. | |
| **February 2011:** Begin work on the user guide. Continue testing areas of the site.  Development of custom work flows and advances features. | |
| **March 2011:** Complete the User Guide. Last stage of testing, entering test data and moving it through the entire life cycle and areas of the SharePoint site. | |
| **April 2011:**  Apply the finishing touches to documenting the system and the system itself. Project fair demo. | |
| Lecturer Comments Just a few comments on the proposal I think the Agile Unified Process might be more appropriate <http://www.ambysoft.com/unifiedprocess/agileUP.html>  I think also you should include something in the descriptor about opportunity management - some intelligent functions  such as prioritisation indicators based on past performance of similar projects, track records with particular companies etc | |
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