Internal CRM System – BrightWave Technologies

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Main sections	Subsections	Details
Project overview	Vision/Goals	To streamline and centralize BrightWave's sales, marketing, and customer success processes by replacing manual tools (spreadsheets and emails) with an internal CRM system. This system will improve lead management, sales tracking, customer onboarding, and marketing attribution
	Objectives	• Track customer leads efficiently • Manage sales pipeline with visibility into deal stages • Improve customer onboarding and handoffs • Enable marketing campaign attribution • Analyze customer data for upsell opportunities
Project scope	In scope	• Lead entry, assignment, and tracking • Sales pipeline dashboard • Campaign-to-lead mapping • Onboarding progress tracker • Internal user dashboards per department
	Out of scope	• Third-party integrations (e.g., Mailchimp, Salesforce) • AI recommendations (phase 2 feature) • External client access or portals • Mobile app version
Stakeholders' identification	User personas	• **Sales Manager** – Needs visibility into lead stages and team activity. • **Marketing Manager** – Wants to measure campaign effectiveness through attribution. • **Customer Success Manager** – Requires a view of onboarding milestones and support tickets.
	Use cases	• Assign and monitor new customer leads • Track the progress of onboarding tasks • Generate a report of campaign-attributed leads • Identify deals at risk of stalling • Analyze support tickets during onboarding
	User stories	• As a **sales manager**, I want to **track lead progress in real-time** so I can **optimize sales strategies**. • As a **marketer**, I want to **attribute leads to campaigns** so I can **calculate ROI**. • As a **customer success manager**, I want to **see onboarding milestones** so I can **follow up proactively**.
Functional requirements		• FR1: System must allow input and editing of leads with custom fields • FR2: Display real-time sales pipeline with visual indicators for stages • FR3: Connect marketing campaigns to lead sources • FR4: Assign and track onboarding tasks per customer • FR5: Provide dashboards for each department (Sales, Marketing, CS)
Non-functional requirements		• NFR1: Web-based interface accessible to internal staff • NFR2: System should support concurrent users without performance lag • NFR3: Data must be backed up daily and stored securely • NFR4: System uptime of 99.9% • NFR5: Role-based access control for data security
Scope of solution	Current process	• Leads entered manually into spreadsheets • Emails used for communication and onboarding updates • No unified view of customer lifecycle • Difficult to measure marketing effectiveness
	Proposed or future process	• Leads captured and updated within CRM • Visual sales pipeline for sales team • Onboarding tasks tracked with due dates • Marketing data linked to lead records • Department-specific dashboards for insights
Project constraints	Risks	• Incomplete data migration from spreadsheets • Limited IT resources for implementation
	Training/staffing needs	• Internal training sessions for CRM usage • Designation of CRM superusers in each department • Support from a Business Analyst/Project Manager
	Budget	• Limited to internal resources and free/open-source CRM platform for MVP • No provision for premium tools or integrations at phase 1
Quality control measures		• User Acceptance Testing (UAT) before go-live • Weekly sprint reviews and demos • Feedback loop from stakeholders post-deployment • Regular system audits and error logging • KPIs to evaluate success (e.g., lead conversion time, onboarding time, campaign ROI)