



Internal CRM System for BrightWave Technologies

Business Requirements Analysis & Process
Modeling

Analysis by: Juliet Ofoegbu



Company Overview

Name: BrightWave Technologies

Industry: SaaS (Software as a Service)

Target Market: Small to mid-sized businesses

Current scenario:

BrightWave is growing rapidly, but its customer onboarding and sales tracking were done manually via spreadsheets and email.

The leadership team initiated a project to build an internal CRM system to streamline operations.

Project Goal: Help BrightWave transition from spreadsheets/emails to an internal CRM that improves lead tracking, sales pipeline visibility, onboarding, and customer interaction insights.



Role and Contribution

As a Business Analyst, I led the requirement elicitation process, simulated stakeholder interviews, identified business requirements, created user stories, prioritized features using MoSCoW, and designed a high-level BPMN workflow to guide development.



Project Objectives



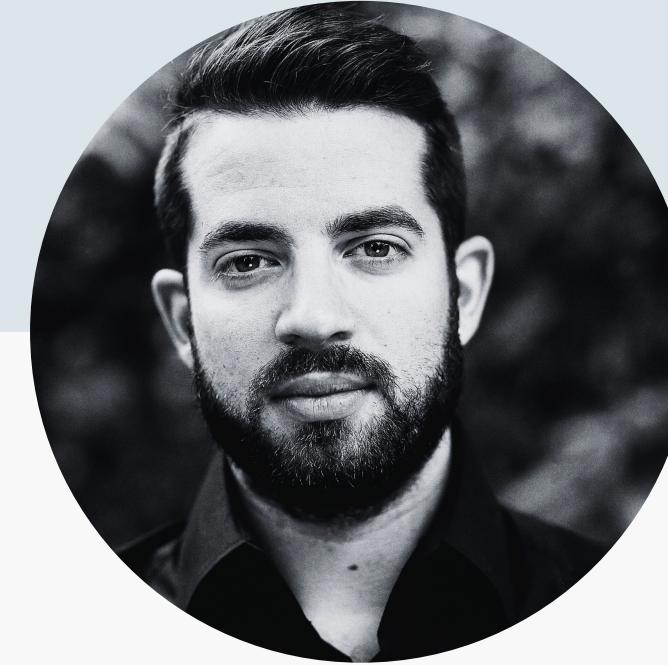
- Track and manage customer leads
- Improve sales pipeline visibility
- Streamline onboarding process
- Tie marketing campaigns to customer data
- Support ticket integration

Identified Stakeholders



Jane

Sales Manager



Tom

Marketing Manager



Amy

Customer Success Manager



Stakeholder Interview & Insights

• • • •

Stakeholder Interview & Insights

Jane (Sales Manager)

Needs real-time lead tracking and pipeline visibility

Tom (Marketing Manager)

Wants campaign attribution linked to lead records



Amy (Customer Success Manager)

Wants onboarding tracking and support ticket visibility

I gathered insights by crafting a list of stakeholder-specific questions based on their role in the CRM workflow. This helped surface pain points and needs clearly.

• • • •

Juliet Ofoegbu

Business Requirements

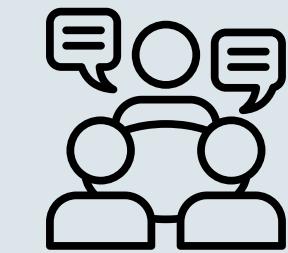
Based on stakeholder feedback and project goals, I defined five key business requirements:



Ability to input, assign, and track customer leads in real time



View and manage sales pipeline stages



Link leads to specific marketing campaigns



Track onboarding tasks and flag delays



Support ticket integration

MoSCoW Prioritization

Must-Have

- Lead tracking
- Sales pipeline visualization
- Onboarding milestone tracking

Should-Have

- Campaign-to-lead linking
- Basic reporting dashboards

Could-Have

- AI-driven upsell suggestions
- Email automation

Won't-Have

- Third-party integrations (for now)



User Stories

Each requirement was turned into a user story using the format

"As a [user], I want [goal] so that [benefit]."



As a sales rep, I want to track lead status in real-time so I can prioritize my outreach

As a marketer, I want to link leads to campaigns so I can measure return on investment (ROI)

As a customer success manager, I want alerts on onboarding delays so I can follow up quickly



Business Process Modeling (BPMN)



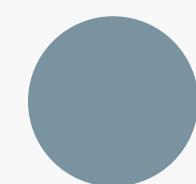
Process Mapped: Customer Acquisition to Onboarding

Tool Used: LucidChart or Draw.io

Steps included:

1. Marketing launches campaign
2. Leads are captured and entered into CRM
3. Sales reviews and qualifies leads
4. Follow-up communication and sales pitch
5. Once converted, customer is handed to onboarding team
6. Customer success team tracks onboarding milestones

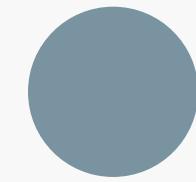
Final Deliverables



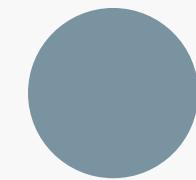
Stakeholder Interview Notes



5 Prioritized Business Requirements
(MoSCoW)



3 Key User Stories



BPMN Diagram (in PNG)



One-page BRD (Business Requirements Document)

Skills Applied



Requirements Elicitation



User Story Creation



Stakeholder Mapping



MoSCoW Prioritization



Process Modeling (BPMN)



Communication & Documentation

Final Reflection

This mini project brought everything together – from engaging stakeholders to writing clear, testable requirements. It was a deep dive into translating business needs into visual and written formats that teams can act on. I now feel more confident about supporting real-world CRM implementation or internal system upgrades as a Business Analyst.





Thank you

Juliet Ofoegbu, Business Analyst

