

CRM - FuSSION

FuSSION_ Connect Wisely

❖ **Product Vision & Goals :**

Vision : To create a comprehensive CRM which helps businesses manage customer interactions, communication, streamline processes and improve customer satisfaction.

Goals :

1. Improve Customer Relationship Management
2. Enhance Sales and Marketing efficiency
3. Provide valuable insights through data analytics

❖ **Market Research and User Personas :**

Market Research : Identify key players, analyse existing CRM solutions, identify gaps, determine USP of my CRM i.e. FuSSION.

User Persons : Define the target users (eg ; Sales and marketing personnels, customer support team, data analytics team)

SWOT Analysis

Company	Strengths	Weaknesses	Opportunities	Threats
Salesforce	Highly customizable, extensive integrations, advanced automation	High cost, complexity in setup and customization	Expansion into new markets, continuous innovation	Competitive pressure from other high-end CRM solutions
HubSpot	User-friendly, strong inbound marketing tools, affordable for SMEs	Limited customization, fewer integrations	Growth in SME market, development of more advanced features	Pressure from other user-friendly CRMs targeting SMEs
LeadSquared	Comprehensive lead management, affordable for SMEs, strong in education sector	Limited marketing automation features	Expansion into other sectors, enhancement of marketing features	Competition from more established CRM platforms
Microsoft Dynamics	Robust analytics, strong integration with Microsoft products, highly scalable	High cost, complexity in setup and customization	Leveraging Microsoft ecosystem for deeper integration, AI and machine learning enhancements	Strong competition from other enterprise-focused CRMs, potential high switching costs for customers

Competitive Analysis Matrix

Feature	Salesforce	HubSpot	LeadSquared	Microsoft Dynamics
Target Market	Enterprises	SMEs and startups	SMEs and education sector	Enterprises and large organizations
Pricing	High	Freemium model, mid-range	Mid-range	High
Ease of Use	Moderate	High	High	Moderate
Customization	High	Moderate	Moderate	High
Integration	Extensive (many third-party apps)	Limited (mainly with other HubSpot tools)	Moderate	Extensive (Microsoft ecosystem)
Marketing Automation	Advanced	Basic to Moderate	Moderate	Advanced
Sales Automation	Advanced	Moderate	Advanced	Advanced
Customer Support	Extensive, but may be costly	Limited with free plan, better with paid plans	Comprehensive	Extensive, but may be costly
Analytics and Reporting	Advanced	Basic to Moderate	Moderate	Advanced
Mobile Accessibility	Advanced	Advanced	Advanced	Advanced
Lead Management	Advanced	Moderate	Advanced	Advanced
Scalability	Very High	High	Moderate to High	Very High
Unique Selling Proposition	Highly customizable and scalable for large enterprises	User-friendly with a strong inbound marketing focus	Comprehensive lead management and sales automation	Integration with Microsoft products and robust analytics
Shortcomings	Expensive, complex setup and customization	Limited customization and integration options	Limited marketing automation features	High cost, complex setup and customization

USP and Gaps

Company	Unique Selling Proposition (USP)	Gaps
Salesforce	Highly customizable and scalable for large enterprises	High cost, complexity in setup and customization
HubSpot	User-friendly with a strong inbound marketing focus	Limited customization and integration options
LeadSquared	Comprehensive lead management and sales automation	Limited marketing automation features
Microsoft Dynamics	Integration with Microsoft products and robust analytics	High cost, complexity in setup and customization

- ❖ Target Customers : FuSSION is being created for the Micro, Small and Medium scale companies. The number of Micro companies in India are 60 Million, Small 2.5 Million and Medium 0.8 million approximately. Most of these companies are also focusing on CRM tools due to the day by day increase in internet consumption and marketing expenses.
- ❖ So the major competitors are Leadsquared and Hubspot

❖ User Personas :

1. Rajesh Kumar - The Growing Entrepreneur

- Demographics:
 - Age: 35
 - Gender: Male
 - Location: Mumbai, India
 - Education: MBA in Marketing
 - Job Title: Founder & CEO
 - Company Size: 15 employees
 - Industry: E-commerce
- Background:
 - Rajesh started his e-commerce business 5 years ago and has seen steady growth.
 - He is tech-savvy and always looking for tools to improve business efficiency.
- Goals:
 - Increase sales and customer retention.
 - Streamline sales and marketing processes.
 - Get insights into customer behavior and preferences.
- Challenges:

- Managing leads and follow-ups manually is time-consuming.
- Difficulty in tracking sales performance and customer interactions.
- Limited budget for high-end CRM solutions.
- Needs:
 - An affordable CRM solution with robust sales automation.
 - Easy integration with existing e-commerce platform.
 - Detailed analytics and reporting features.
- Preferred Features:
 - Sales pipeline management.
 - Automated follow-up reminders.
 - Customer segmentation and targeting.
 - Integration with email marketing tools.

2. Anjali Singh - The Sales Manager

- Demographics:
 - Age: 29
 - Gender: Female
 - Location: Delhi, India
 - Education: Bachelor's in Business Administration
 - Job Title: Sales Manager
 - Company Size: 50 employees
 - Industry: Manufacturing
- Background:
 - Anjali has been in the sales industry for 7 years and recently joined a growing manufacturing firm.
 - She is responsible for managing a team of 10 sales representatives.
- Goals:
 - Improve team productivity and sales performance.
 - Track sales activities and outcomes more efficiently.
 - Enhance customer relationship management.
- Challenges:
 - Lack of visibility into team performance and sales metrics.
 - Inefficient lead management and follow-up processes.
 - Need for real-time data to make informed decisions.
- Needs:
 - A CRM that offers real-time sales tracking and reporting.
 - Tools for team collaboration and communication.
 - Mobile access for on-the-go updates and interactions.
- Preferred Features:
 - Dashboard for tracking team performance.
 - Lead scoring and assignment.
 - Mobile app with offline access.
 - Integration with ERP systems.

3. Vikram Patel - The Marketing Coordinator

- Demographics:

- Age: 32
- Gender: Male
- Location: Bangalore, India
- Education: Master's in Marketing
- Job Title: Marketing Coordinator
- Company Size: 30 employees
- Industry: IT Services
- Background:
 - Vikram works in a mid-sized IT services company, handling all marketing activities.
 - He focuses on lead generation and nurturing through digital marketing channels.
- Goals:
 - Generate high-quality leads for the sales team.
 - Implement and track marketing campaigns effectively.
 - Improve ROI on marketing efforts.
- Challenges:
 - Difficulty in tracking the effectiveness of marketing campaigns.
 - Lack of integration between marketing and sales processes.
 - Limited tools for customer segmentation and personalization.
- Needs:
 - A CRM that integrates marketing automation tools.
 - Campaign tracking and analytics.
 - Features for customer segmentation and personalised marketing.
- Preferred Features:
 - Email and social media campaign management.
 - Landing page creation and lead capture.
 - Detailed campaign performance analytics.
 - Integration with Google Analytics and other marketing tools.

4. Priya Sharma - The Customer Support Lead

- Demographics:
 - Age: 28
 - Gender: Female
 - Location: Hyderabad, India
 - Education: Bachelor's in Information Technology
 - Job Title: Customer Support Lead
 - Company Size: 20 employees
 - Industry: Healthcare Services
- Background:
 - Priya heads the customer support team in a healthcare services startup.
 - She ensures that all customer queries and issues are resolved promptly.
- Goals:
 - Enhance customer satisfaction and loyalty.
 - Streamline the support ticket management process.
 - Gain insights into common customer issues for proactive resolution.
- Challenges:

- Managing a high volume of support tickets with limited resources.
- Lack of a centralised system for tracking customer interactions.
- Difficulty in measuring support team performance.
- Needs:
 - A CRM with a robust ticketing system.
 - Centralised customer interaction history.
 - Performance tracking and reporting tools for the support team.
- Preferred Features:
 - Automated ticket assignment and escalation.
 - Customer feedback and satisfaction tracking.
 - Knowledge base and self-service portal.
 - Integration with chat and email support channels.

❖ Key Features of FuSSION CRM :

Core Features

1. **Lead Management**
 - Automated lead capture from various sources (website, social media, email).
 - Lead scoring and prioritization.
 - Customizable lead nurturing workflows.
2. **Sales Pipeline Management**
 - Visual sales pipeline with drag-and-drop functionality.
 - Automated task reminders and follow-ups.
 - Customizable sales stages and milestones.
3. **Marketing Automation**
 - Email marketing campaigns with templates.
 - Social media integration and scheduling.
 - Landing page builder with lead capture forms.
4. **Customer Relationship Management**
 - Centralized customer database with detailed profiles.
 - Interaction tracking (calls, emails, meetings).
 - Customer segmentation for targeted campaigns.
5. **Analytics and Reporting**
 - Real-time dashboards and customizable reports.
 - Sales and marketing performance metrics.
 - Customer behavior and trend analysis.
6. **Integration and Customization**
 - Integration with popular tools (Google Workspace, Microsoft Office, accounting software).
 - API for custom integrations.
 - Customizable fields, layouts, and workflows.
7. **Mobile Accessibility**
 - Mobile app with offline access.
 - Push notifications for important updates.
 - Mobile-optimized interface.

8. Customer Support and Ticketing

- Built-in ticketing system with automated routing.
- Knowledge base and self-service portal.
- Customer feedback and satisfaction tracking.


Gaps in Competitors (HubSpot and LeadSquared)

- **HubSpot:**
 - Limited customization options.
 - Fewer integrations with third-party applications outside the HubSpot ecosystem.
 - High cost for advanced features.
- **LeadSquared:**
 - Limited marketing automation capabilities.
 - Less comprehensive analytics and reporting.
 - Limited scalability for rapidly growing businesses.

Unique Features of FuSSION CRM

1. **Unified Communication Platform**
 - Integrated chat, email, and voice communication within the CRM.
 - AI-powered chatbots for customer interactions.
 - Real-time communication tracking and logging.
2. **Advanced AI and Machine Learning**
 - Predictive analytics for sales forecasting and lead scoring.
 - AI-driven insights for customer behavior and preferences.
 - Automated recommendations for next-best actions.
3. **Gamification for Sales Teams**
 - Leaderboards and achievement badges for sales milestones.
 - Real-time performance tracking and feedback.
 - Motivational tools to enhance sales team productivity.
4. **Comprehensive SME Toolkit**
 - Invoicing and payment tracking integrated within the CRM.
 - Project management tools to track deliverables and deadlines.
 - Vendor management module for managing supplier relationships.
5. **Enhanced Security and Compliance**
 - Advanced data encryption and security protocols.
 - GDPR and local compliance tools for data privacy.
 - Role-based access control and audit logs.
6. **Customer Loyalty Programs**
 - Built-in tools to create and manage loyalty programs.
 - Customer rewards tracking and redemption management.
 - Automated notifications for loyalty milestones.

Competitive Analysis Matrix

Feature	FuSION CRM	HubSpot	LeadSquared
Target Market	MSMEs	SMEs and startups	SMEs and education sector
Pricing	Competitive, value-for-money	Freemium model, mid-range	Mid-range
Ease of Use	High	High	High
Customization	High	Moderate	Moderate
Integration	Extensive, including third-party apps and API	Limited (mainly within HubSpot ecosystem)	Moderate
Marketing Automation	Advanced, with unique AI features	Basic to Moderate	Moderate
Sales Automation	Advanced, with gamification features	Moderate	Advanced
Customer Support	Comprehensive, with built-in ticketing and knowledge base	Limited with free plan, better with paid plans	Comprehensive
Analytics and Reporting	Advanced, with predictive analytics	Basic to Moderate	Moderate
Mobile Accessibility	Advanced, mobile app with offline access	Advanced	Advanced
Lead Management	Advanced, with AI-driven insights	Moderate	Advanced
Scalability	High	High	Moderate to High
Unique Selling Proposition	Unified communication, AI-driven insights, gamification	User-friendly with strong inbound marketing focus	Comprehensive lead management and sales automation
Shortcomings	New entrant, may need time to establish market trust 	Limited customization and integration options	Limited marketing automation features

Design the CRM

- **Wireframes and Mockups:** Use tools like Figma or Sketch to create wireframes and mockups of the CRM interface.
- **User Interface Design (UI)**
- **User Experience (UX) Design:** Focus on creating an intuitive and user-friendly design.

Develop the CRM

- **Tech Stack:**
 - Front-end: HTML, CSS, JavaScript (React or Angular)
 - Back-end: Node.js, Python (Django/Flask), or Ruby on Rails
 - Database: PostgreSQL, MySQL, or MongoDB
- **Tools:**
 - Version Control: Git, GitHub
 - Project Management: Jira, Trello
 - CI/CD: Jenkins, Travis CI

Testing and Quality Assurance

- **Unit Testing:** Write tests for individual components.
- **Integration Testing:** Ensure that all components work together as expected.
- **User Acceptance Testing (UAT):** Get feedback from potential users.

Deployment

- **Hosting:** AWS, Azure, or Heroku
- **Monitoring:** Use tools like New Relic or Datadog for monitoring performance.

Documentation and Training

- **User Manuals:** Create comprehensive user guides and manuals.
- **Training Materials:** Develop training materials for end-users.