CRM DEVELOPMENT PROPOSAL

For

Allahabad UP Gramin Bank

Indira Nagar, Lucknow, India

Prepared By/Modified By: Sunil Thakur

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PHASES

PHASE 1: PRE-PLANNING FOR HOW TO BUILD AN APPLICATION

The first phase of any project is often the most important. When building an application, it's critical to take the time to go through the necessary planning steps.

Step 1: Define the project and create use cases. Create a written definition of your app idea that clearly spells out what it will do, who the users are and why they will care about it. Make sure you can answer the question "why does this app need to exist?" What unique problem does it solve? Will the application simplify payment transactions for customers? Will it increase productivity for field agents? What is the business case? Use this information to create use cases to guide the project.

Step 2: Do your research. Is there already an app on the market similar to the one you are thinking to build? If so, how can you do it better?

PHASE 2: MENTAL PROTOTYPING / DISCOVERY

A mental prototype is a brainstorm to help define a concept in visual terms. It's the first opportunity to start to see how the app might evolve…and to get a reality check.

Step 3: Involve the development team or technical architect. Ideally, the development team is involved at the beginning of the project, but if the technical people who are actually going to build your application aren't already on board, now's the time to bring them in. This is when you can determine if your idea is feasible, can be successful and what expectations you should have for time and budget.

Step 4: Storyboard. With the use cases you created in Phase 1, create rough sketches of the idea on a sketchpad, whiteboard, or template tiles. This is the first visual representation of all the screens and will help uncover usability issues.

PHASE 3: TECHNICAL FEASIBILITY ASSESSMENT

It's not enough to have cool interactions and an understanding of the visuals. You need to consider whether the back-end systems will actually support the application's functionality. For basic assessment of technical feasibility, you must do the following:

Step 5: Get access to the data. Your application needs to access usable data. Figuring this out could be as simple as sourcing a Public APIs or as complicated as building your own abstraction layer.

Step 6: Determine what devices you are building your application for.

An application will have different requirements depending on its platform as well as the format

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Step 7: Refine project definition and establish go-to-market strategy. By the end of this phase, the team may have new ideas for the application or have determined that some of the initial functionality isn't feasible. At this point, take some time to brainstorm, ask questions and review the status.

PHASE 4: TACTILE REFINEMENT OF USE CASES

It's very difficult to define the experience without being able to touch the application and experience how it works and flows. Phase 4 is about just that.

Step 8: Build a rapid prototype. "Rapid" is the operative word – build a prototype that gets the application *concept* into a user's hands as quickly as possible so you can see how it works for the most common use case. Use rough, not exhaustive, wireframes. Bring your users in to touch the prototype to garner feedback as early as possible.

PHASE 5: DESIGN YOUR APPLICATION AND PREPARE FOR DEVELOPMENT

Now is when the real work begins:

Step 9: Design for the user experience. Before you dive into code, you must design. A User Experience (UX) Designer can create the interaction architecture of the design elements. A User Interface (UI) Designer for mobile solutions can create the look and feel of your application. This is a multistep process with its own review stages. The end result is visual direction and blueprints that inform your engineers of the envisioned final product and how interaction should feel, move and flow.

PHASE 6: BUILD YOUR APPLICATION WITH AGILE PRACTICES

The strategy is complete, the stage is set, and you have your design. It is now time to build an application!

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Step 10: Agile Development. Agile is the preferred approach for mobile development due the importance of collaboration, transparency, and rapid iteration to adapt to change. These practices of adapting to change are critical to finding success in the ever-evolving mobile channel.

PHASE 7: TEST YOUR APPLICATION

Congratulations! You have built an application. Now it's time to get some of your target users to help you test it.

Step 11: UAT testing. User acceptance testing is a process to discover whether your application works for users. In other words, put your application in the hands of a few people in your target audience. Once your application has passed the UAT test, you know that the solution "works".

Step 12: BETA testing. Make your application available for a beta trial, either through an open solicitation for participants or the enrollment of previously identified groups. Feedback from beta users will help you determine whether or not the application's functions are operating well in a real-world environment.

PHASE 8: LAUNCH – YOU BUILT AN APPILCATION!

Your application is complete and ready to submit. Pick a day and key up a formal launch. Congratulations! You have learned how to build an application!

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Scope

We need to develop a customize CRM Solution for Pension management Scheme.

1. Employee Management

- Personal Record Manage
- Account Information
- Document Management

2. Eligibility Criteria

- Client will define the eligibility criteria for employee who is eligible for getting benefit of pension scheme.

3. Pension Calculation

- Pension Calculation will be done as per rule define by government.
- Rule will be modified only as per requirement of client.

4. Pension Distribution & Record Maintained

- Salary Input through form and average salary calculated.
- TDS Calculation
- All the pension is dynamically calculated and record is maintained in database.

5. MIS Reporting System

- Employee Record
- Pension Distribution Record

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SUPPORT

03 months support for any bug fixing, app crash and ANR

Cost & Time Estimation

Task/Module	~Production Time	Total Cost (in INR)
UI/UX and HTML Designing	~10 Days	
Database and Coding	~45 Days	
Quality Analysis, Support	~ 05 Days	
Total	**60 working days**	**4,30,000**

1. GST (18%) extra as applicable.
2. 3rd Party API's to be provided by client.

PAYMENT TERMS

20 % upfront
20 % once design is approved
20 % beta version release
40 % after all the work is completed before handover

CONCLUSION

We would like to thank you for giving us the opportunity to work on your project. We look forward to start this project and adding value to your online business model.

Sincerely,

Sunil