

Meeting Notes.Pdf

Meeting Notes: CRM Requirements Discussions

Stakeholder Meeting Notes:

During a series of meetings with key stakeholders, we identified critical features and functionalities required for the CRM system, including enhanced reporting, automation, and integration with existing tools.

1. Key Requirements Identified by Sales Team

The sales team emphasized the need for an easy-to-use interface and the ability to track customer interactions across channels.

Example:

Sales reps want a dashboard that provides a 360-degree view of the customer, showing their purchase history, preferences, and previous interactions.

2. Customer Support and Service Features

The support team highlighted the need for a ticketing system integrated with the CRM, allowing them to track customer issues and resolutions.

3. Integration with Marketing Automation Tools

Marketing wants to integrate their email automation tool with the CRM to enable targeted email campaigns based on customer behavior.

4. Budget and Timeline Considerations

The project has a budget of \$500,000, with a target completion date within six months. The majority

of the budget will be spent on software licenses and development.

5. Next Steps and Action Items

We will next review CRM vendors that meet the identified requirements and schedule demos for the teams.