

Project Charter: Implementing a Customer Relationship Management (CRM) System

Summary: The project aims to implement a comprehensive Customer Relationship Management (CRM) system to streamline customer interactions, improve data management, and enhance overall customer satisfaction.

Goals:

- Define CRM system requirements based on stakeholder needs.
- Select a suitable CRM platform and vendor.
- Customize the CRM system to align with organizational processes and workflows.
- Train employees on how to effectively use the new CRM system.
- Ensure seamless integration of the CRM system with existing IT infrastructure.
- Conduct regular evaluations to measure the effectiveness of the CRM system.

SMART Goals:

- Increase customer satisfaction scores by 15% within the first six months of CRM implementation.
- Reduce response time to customer inquiries by 20% by the end of the year.
- Increase sales conversion rates by 10% within the first quarter post-implementation.

Deliverables:

- Requirements documentation.
- Vendor selection report.
- Customized CRM system.
- Training materials and sessions.
- Integration plan and documentation.
- Evaluation reports.

In-Scope:

- Integration with existing customer databases.
- Customization of CRM dashboards for different user roles.

Out-of-Scope:

- Data migration from legacy systems not related to CRM.

Benefits:

- Improved customer satisfaction and loyalty.
- Enhanced data accuracy and accessibility.
- Increased sales efficiency and effectiveness.
- Better insights into customer behavior and preferences.

Costs:

- CRM software license fees.

Implementation and customization costs.

Training expenses.

Integration expenses.

Appendix: Misalignments and Decisions:

Misalignment: Stakeholders disagree on the preferred CRM vendor.

Decision: Form a selection committee comprising representatives from different departments to evaluate vendors objectively.

Misalignment: IT department proposes a complex CRM system while other departments prefer a simpler solution.

Decision: Conduct a cost-benefit analysis to determine the most appropriate solution that balances functionality and simplicity.

Misalignment: Marketing team requests additional customizations beyond the project scope.

Decision: Document the requested customizations for future consideration but proceed with the agreed-upon scope to avoid scope creep.