

BANNARI AMMAN INSTITUTE OF TECHNOLOGY

STUDENT NAME:VISHAL B

PROJECT ID:28

PROJECT TITLE:CONTACT MANAGEMENT

TECHNICAL COMPONENTS:

FRONTEND	REACT.JS
BACKEND	NODE.JS EXPRESS.JS
DATABASE	MONGODB
API	REST FUL API

PROBLEM STATEMENT:

Contact management is beset with serious problems in our BPO company, such as disjointed data storage, inconsistent data entry, ineffective communication tracking, low automation, and challenges with segmentation and customisation. Inadequate data protection protocols and subpar interaction with other corporate tools exacerbate these problems. In order to overcome these obstacles, we must put in place a comprehensive CRM system that improves efficiency, accountability, and overall operational performance by centralizing contact data, standardizing data entry, enhancing communication tracking, incorporating automation, guaranteeing data security, and integrating seamlessly with other tools.

PROJECT FLOW:

PURPOSE:

In a BPO setting, efficiently managing a high number of contacts might be difficult. Clients, customers, and different stakeholders can all be considered contacts. It becomes more difficult to keep track of interactions, control communications, and ensure data correctness without a structured system, which could result in lost productivity and possible business inefficiencies.

SCOPE:

- **Contact Storage:** A vast database that holds contact information such as names, phone numbers, email addresses, and other pertinent data.
- **Tracking Interactions:** Recording and monitoring every correspondence with contacts, including phone conversations, emails, and meetings.
- **Search and Retrieval:** Quickly locate and obtain contact details with our effective search functionality.
- **Integration:** Easy connection to other systems, like email, phone management, and CRM.
- **User management:** To protect data security and privacy, use role-based access control.
- **Analytics and Reporting:** Provide data on usage trends, contact exchanges, and other pertinent metrics.

BUSINESS CONTEXT:

Sustaining excellent customer service and operational efficiency in a BPO setting depends on efficient contact management. The foundation of client relationship management, communication tactics, and general business operations will be provided by the Contact Management module. The module will assist in decreasing response times, raising customer satisfaction, and increasing overall productivity by centralizing and organizing contact information.

CONSIDERATIONS:

Data security: Using secure access procedures, encryption, and frequent audits to guarantee that private contact information is kept safe.

Scalability: Creating a system that can accommodate an increase in contacts and interactions as the company grows.

User Training: Ensuring users receive enough instruction to make efficient use of the Contact Management module.

Compliance: Making sure the system conforms to applicable industry-specific standards or data protection laws, such as the GDPR.

Integration with Current Systems: Taking into account how the module will work with the phone, email, and CRM platforms that are currently in use.

USER PERSONAS:

Needs quick access to contact details and interaction history to resolve customer queries efficiently. Requires the ability to monitor team interactions with contacts, generate reports, and analyze performance. Responsible for managing user access, maintaining data security, and

ensuring system integration with other tools. Analyzes interaction data to identify trends, optimize processes, and provide insights for business strategy.

FUNCTIONAL REQUIREMENTS:

We can view, add, remove, import, and export contact information. For every contact, keep track of and access their history of communications (calls, emails, meetings). Lookup and Recovery Use extensive filtering options to search contacts by email, phone number, or name. Utilize tags to assign and filter contacts for simple classification. For synced data, integrate with CRM platforms and other communication tools.

FLOW CHART:

