# Business Requirement Document

## **1. Purpose**

The purpose of this Business Requirement Document (BRD) is to define the business requirements for the development of CRM software for the sales team. This document serves as a guide for stakeholders and the project team to align on the expected outcomes.

## 2. Project Overview

The CRM software aims to enhance the productivity and efficiency of the sales team by providing a centralized platform for managing customer relationships, tracking sales activities, and analyzing performance.

## 3. Business Objectives

## Foster better customer relationships through consistent follow-ups and automated reminders.

## Reduce manual data entry by integrating third-party tools for data synchronization.

## Provide the sales team with actionable insights via AI-driven lead scoring.

* Streamline customer data management.
* Improve sales process visibility and tracking.
* Enhance team collaboration and communication.
* Increase customer satisfaction and retention rates.
* Enable data-driven decision-making through detailed reporting and analytics.

## 4. Business Requirements

## **Automation:** Implement workflow automation for routine tasks such as sending follow-up emails, setting reminders, and generating reports.

## **User Interface:** Ensure the system has an intuitive and user-friendly interface to minimize training needs.

## **Scalability:** Design the CRM to support future growth in the number of users and data volume.

**The following business requirements must be fulfilled by the CRM software:**

* **Customer Management:** Maintain detailed customer profiles with contact information, interaction history, and preferences.
* **Sales Pipeline:** Provide tools to track leads, opportunities, and deal statuses.
* **Reporting:** Enable generation of customized sales reports and performance metrics.
* **Task Management:** Allow users to schedule, track, and manage sales-related tasks.
* **Integration:** Ensure seamless integration with email, calendar, and existing sales tools.
* **Mobile Access:** Ensure the system is accessible via mobile devices.

## 5. Stakeholders

## **Customers:** Indirect beneficiaries of improved customer service and relationship management.

## **Marketing Team:** Collaborators for lead generation and nurturing strategies.

**The primary stakeholders for this project include:**

* **Sales Team:** End users who will utilize the CRM software.
* **Sales Managers:** Supervisors monitoring performance and managing reports.
* **IT Department:** Responsible for system deployment and maintenance
* **Senior Management:** Decision-makers overseeing project success.

## 6. Project Constraints

## **Data Security:** Ensure compliance with relevant data protection regulations such as GDPR or CCPA.

## **User Adoption:** Time and resources must be allocated for training to ensure smooth adoption of the new system.

* **Budget:** The project budget is capped at $25,000.
* **Timeline:** The project must be completed within 12 weeks.
* **Resource Availability:** Limited IT resources for system integration and support.

## 7. Assumptions

* The sales team will provide timely and accurate feedback during the development process.
* Existing infrastructure will support the CRM system.
* All required licenses and permissions for third-party integrations will be provided.

## **8. Approval and Sign-Off**

This document requires approval from the stakeholders listed below to proceed with the development of the CRM software.

Approved by:  
Name:   
Date: