# **Scope Document for CRM Software Development to Sales Team**

## 1. Introduction

This document outlines the scope, requirements, and deliverables to develop Customer Relationship Management (CRM) software tailored to the needs of the sales team. The primary goal of the CRM software is to enhance customer interactions, streamline sales processes, and improve team productivity.

## 2. Objectives **The CRM software will enable the sales team to:**

* **Streamline Sales Processes:** Automate lead generation, tracking, and pipeline management.
* **Centralized Data:** Consolidate customer information, sales records, and communications into a single platform.
* **Improve Collaboration:** Facilitate teamwork through shared dashboards, task assignments, and communication tools.
* **Actionable Insights:** Generate detailed reports and analytics to drive informed decision-making.
* **Scalable Solution:** Build a scalable platform that can adapt to future requirements and team growth.

## 3.SCOPE

**In-Scope Activities:**

* **Requirement Gathering:** Identify workflows, pain points, and CRM feature requirements.
* **CRM Design:** Develop wireframes and workflows.
* **Core Features Development:** Implement lead management, pipelines, task automation, and
* analytics.
* **Advanced Features Development:** Integrate tools and build mobile apps if required.
* **Testing and QA:** Perform functional and UAT testing.
* **Deployment:** Host the CRM securely.
* **Training and Documentation:** Provide user guides and training.

**Out of Scope Activities:**

* Long-term maintenance and unrelated modules.

## **4. Features**

**The software will include the following features:**

* **Contact Management**: Store and organize customer information.
* **Sales Pipeline**: Visualize and manage sales opportunities.
* **Task Automation**: Automate follow-ups, reminders, and email communication.
* **Reporting and Analytics**: Track key metrics and generate customizable reports.
* **Integration:** Sync with email and calendar systems.
* **Mobile Accessibility**: Ensure usability on smartphones and tablets.

## 5. Stakeholders

**The key stakeholders include:**

* **Sales Team:** End-users who will use the CRM daily.
* **Management:** Supervisors and decision-makers requiring insights.
* **IT Team**: Responsible for software implementation and support.

## **6. Deliverables**

**The project will deliver:**

* Functional CRM software meeting the outlined requirements.
* User training materials and sessions.
* Technical documentation for IT support and future maintenance.
* Customizable reporting tools.

## **7.Tools And Technologies**

* **Backend:** Node.js/Spring Boot
* **Frontend:** React.js
* **Database:** Mongo DB
* **Hosting:** AWS or on-premise.

## 8. Timeline

**The project will follow this tentative timeline:**

* Requirement Gathering: 2 days
* Design and Prototyping: 2 days
* Development: 3 days
* Testing and QA: 2 days
* Deployment and Training: 1 weeks

## 9. Scope Limitations

**This project does not include:**

* Hardware procurement or upgrades.
* Third-party integrations beyond the specified list.

## 10.**Success Metrics**

* Adoption rate
* Automation
* Data accuracy
* Improved productivity

1**1**.Approval  
This document requires approval from the project stakeholders before the commencement of the project.

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