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Portfolio

Business Analyst 



2024

Pitman Training

This portfolio showcases Pitman Training project and work samples related to CRM implementation, business case development, wireframing, use case diagrams, process mapping, user stories, and final project documentation. The included documents highlight expertise in project management, business analysis, and CRM system design.

1. Caldwell CRM Project Kickoff

Overview:

- Initial project kickoff presentation for CRM implementation at Pitman Training.
- Defines project scope, objectives, key stakeholders, and project timeline.
- Discusses integration with marketing, sales, and customer management systems.

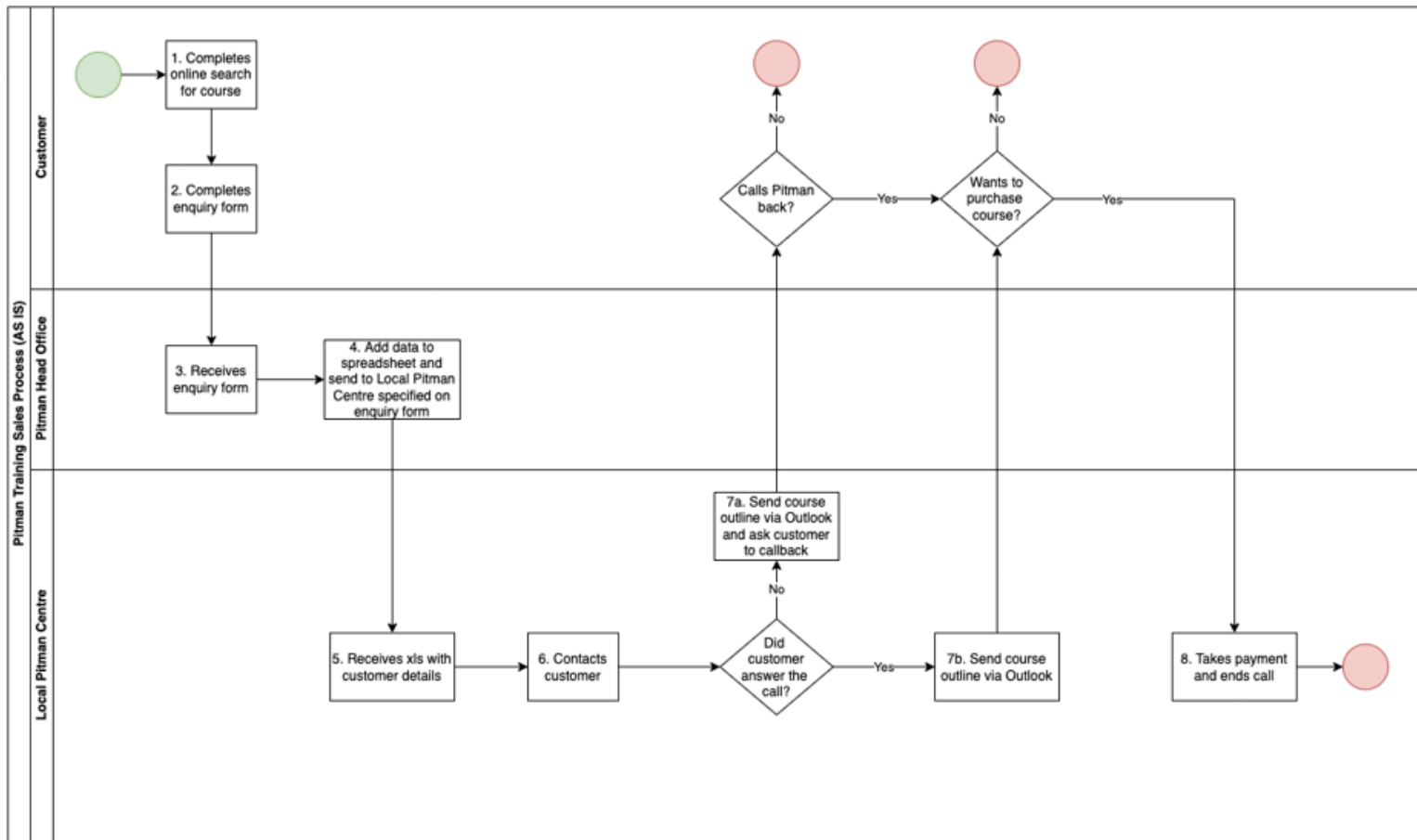
Key Highlights:

- Project roadmap and milestones.
- Key performance indicators (KPIs) for success.
- Risk assessment and mitigation strategies.
- Project governance and structure, including bi-weekly calls and support sessions.
- Evaluation of CRM market trends and implementation importance.

2. Pitman Sales Process – AS-IS and TO-BE

Overview:

- A visual representation of the current sales process at Pitman (AS-IS) before CRM implementation.
- A redesigned process flow (TO-BE) illustrating improved efficiency and automation.



Key Highlights – Pitman Training Sales Process (AS IS)

Process Mapping & Documentation

- Developed a clear and structured swimlane diagram to visualize the end-to-end sales process for Pitman Training.
- Clearly defined responsibilities across three key actors: Customer, Pitman Head Office, and Local Pitman Centre.
- Mapped both automated and manual steps, identifying potential areas for streamlining.



Key Highlights – Marketing & Sales "To-Be" Process Diagram

Future-State Process Design

- Created a comprehensive "To-Be" process diagram outlining a modern, streamlined marketing and sales funnel.
- Defined a vision for digital transformation, transitioning from a manual-heavy process to an integrated, automated ecosystem.

3. CRM TOM (Target Operating Model) Use Case Diagram

Overview:

- Diagram showcasing key actors and processes in the CRM system.
- Defines interactions between marketers, business owners, and customers.



Key Highlights – CRM Target Operating Model (TOM) Use Case Diagram

Strategic CRM Architecture Design

- Developed a Target Operating Model (TOM) use case diagram for CRM that aligns marketing, sales, and customer data workflows.
- Clearly defined system interactions and stakeholder responsibilities for a customer-centric CRM ecosystem.

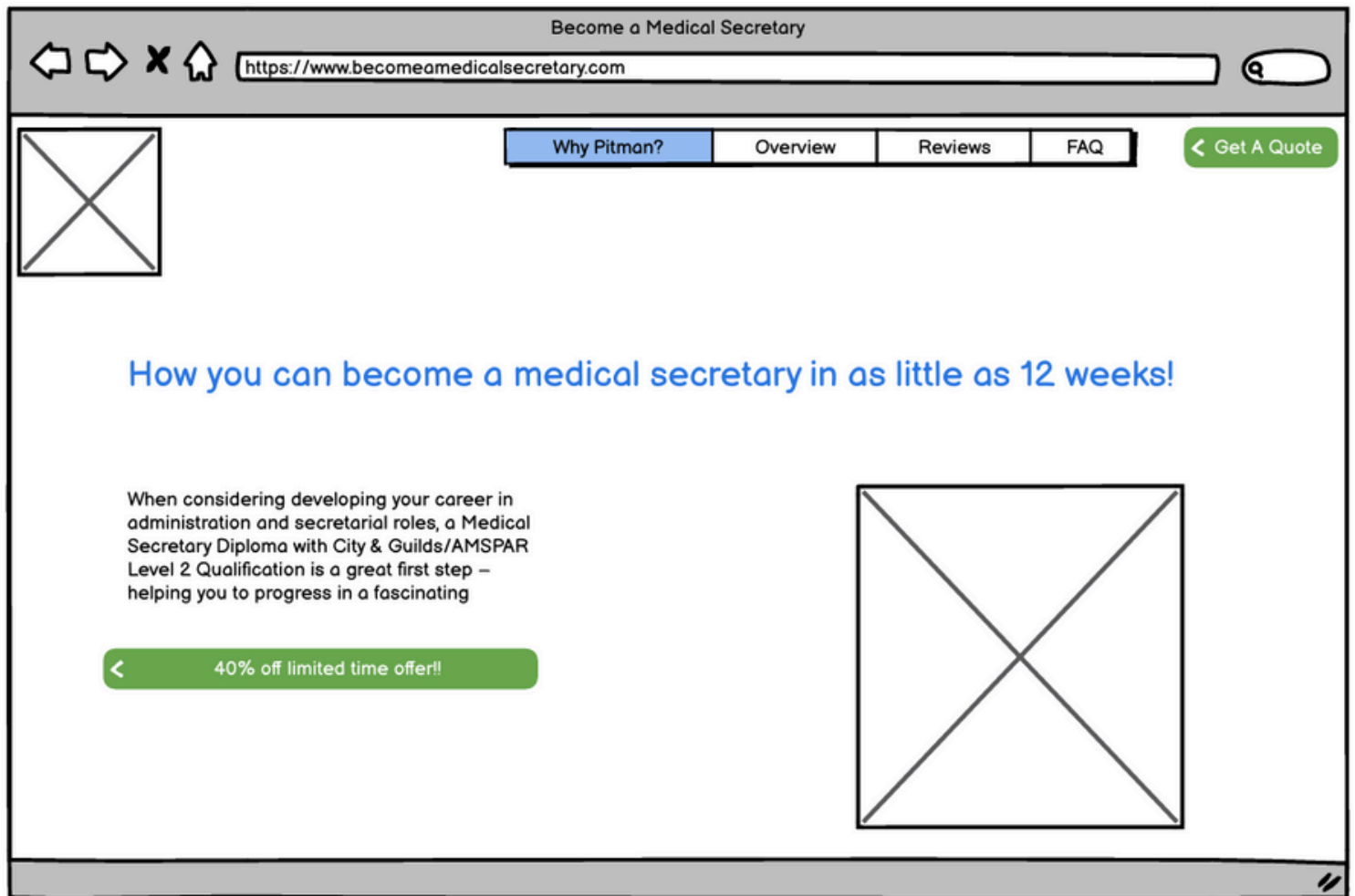
4. Balsamiq Wireframing for CRM Website

Overview:

- Wireframe design for a CRM-integrated website created using Balsamiq.
- Illustrates user journey from lead generation to customer engagement.

Key Features:

- Homepage with CRM-integrated lead capture.
- Opt-in and scheduling pages.
- Confirmation and follow-up automation features.
- Visual representation of user interactions and UI components.



5. CRM User Stories

Overview:

- Defines user roles, actions, and expected outcomes in the CRM system.
- Focuses on improving user experience and meeting business requirements.

Sample User Stories:

- “As a sales representative, I want to automatically track leads so that I can follow up efficiently.”
- “As a marketing manager, I want to segment customer data so that I can run targeted campaigns.”
- “As an admin, I want to generate reports on sales performance so that I can analyze trends.”

Requirements Catalogue					Project:							
					Author:							
												Test Result
ID	Epic	Description (As a ____ I want ____ So that I can ____)	Source	Priority	Acceptance Criteria	Comments	Related Document	Related Requirement	Accept	Reject		
1.1	Accounts & Contact Management	As a marketer, I want to be able to send automated email campaigns, so that business can generate additional revenue	marketer	Must Have	The solution allows the user to issue marketing campaigns to prospects							✓
					The solution allows us to track the open rate of email campaigns							
					The solution allows us to wait for a period of time before sending automated follow up messages to prospects							
1.2	Accounts & Contact Management	As a Marketer, I want to be able to customise email campaigns with company branding, so that prospective customers are aware of who is contacting them	marketer	Must Have	The solution allows us to add the company logo to email campaigns							
					The solution allows us to link the company website within an email							
					The solution allows us to measure the click through rate onto our website							
					The solution allows us to attach files for the prospective customer to browse							
1.3	Accounts & Contact Management	As a sales manager I want the calls of my sales team to be recorded, so that I can monitor their activity	Sales Manager	Must Have	The solution helps sales representatives to record calls							
1.4	Accounts & Contact Management	As a sales person I want to call my prospects directly from the crm, so that I don't have to waste time switching between systems	Sales Person	Must Have	The solution provides a built-in telephonic caller to click directly and make calls to the contacts without							
	Accounts & Contact Management	As a sales manager, I want to have a log of all of my sales	Sales		The solution automatically logs all incoming and outgoing calls. It also has provisions to manually log a call and map it to an existing lead or							

6. CRM Requirements Catalogue

Overview:

- Spreadsheet outlining functional and non-functional requirements for CRM implementation.
- Defines user roles, features, and integration points.

Key Requirements:

- Contact management and lead tracking.
- Email marketing automation.
- Reporting and analytics dashboards.

7. CRM Implementation Business Case

Overview:

- Justification for migrating to a new CRM system at Pitman Training .
- Evaluates three CRM solutions: Salesforce, ActiveCampaign, and MailChimp.

Key Considerations:

- Cost-benefit analysis and budget allocation.
- Expected improvements in efficiency and customer experience.
- Stakeholder approval and project funding.

8. Final Draft

Overview:

- Finalized project documentation and deliverables from CRM implementation.
- Includes presentation slides, process flows, and structured reports.

Key Components:

- Project summary and outcomes.
- Stakeholder feedback and approvals.
- Future recommendations and potential improvements.



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Thank you

This portfolio demonstrates expertise in CRM implementation, business analysis, wireframing, process optimization, and user experience design. Each document contributes to a comprehensive understanding of CRM system planning, development, and execution.

For further details or inquiries, please feel free to reach out.