CRM Requirements

American Video Game Company

Customer Relationship Management System
Business Vision Document/Business Requirements

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Introduction

American Video Game Company is accepting proposals to develop a new customer relationship management (CRM) system. This document is a business vision document that includes key business requirements for the new system. It does not provide detailed system requirements.

This document provides enough information for a vendor to provide a recommendation for a system to fit the American Video Game Company's needs. The proposal provided by the vendor is required to be comprehensive and include enough detail so American Video Game Company can determine if it fits the needs of the organization. The project that will be undertaken with the vendor who is awarded the contract will then include steps to produce the detailed requirements, use cases, design, and other deliverables.

Open source, off the shelf, configurable/customizable off the shelf, commercial offerings, and custom development are all acceptable solutions to fit the requirements. There may be an existing system that will fulfill all the needs of the organization, but if custom development is more appropriate, this may be proposed, with supporting information. The vendor is to keep in mind the changes and enhancements that may be required throughout the life of the system as well as the scalability of the system when completing the proposal.

Background

American Video Game Company is planning to launch an internal CRM system to allow for better management of several disconnected manual and automated processes. The system should be able to be integrated with other systems now and in the future to maximize and improve the efficiency of data sharing, reporting, and business process flows.

The company is a premier developer and publisher of computer games. The games are well designed and highly enjoyable for the customer. The company is known for the quality of its games and has been ranked #1 for several years. The games are purchased through different mediums, including an online game service. There are mobile options for some, but not all, of the games the company develops and sells. The company also offers products such as action figures, novels, comics, board games, and apparel. Future endeavors may include working on producing movies based on the characters and plots in the games.

Sales have been up by 42% in the past two years, so the company is currently outgrowing its existing systems for managing all aspects of CRM. The new system will be a crucial tool in being able to efficiently manage client contacts, perform sales tracking, maintain activity management, and manage reporting.

Project Overview

Key Technical Objectives

To provide a system that:
- consolidates all contact and business information.
- reports the company's activities and interactions with contacts.
- controls access to features based on roles and permissions for the company's users, both internal and remote.
- enables access to the system by 3rd party marketing companies under contract.

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- manages activities and tracks sales.
- integrates with other systems to allow for sharing of data.
- has robust security.
- can be enhanced and scaled.

Expectations

The system proposed must:
- be easy to use, intuitive, and user friendly.
- have a clearly identified support and maintenance structure.
- have a clearly identified roadmap for future updates and development.
- have the ability to be extended, modified, and integrated in the future without reliance on a single company or team.
- have a clearly identified licensing model and defined ownership rights regarding any custom development.
- work with the company's internal hosting infrastructure or have sound justification for alternate options (e.g., hosting independently or in the cloud).

Data Management

The process for collecting and storing data related to partners, stakeholders, and contacts must be in accordance with the law and best practices. The solution proposed must be compliant with data protection laws and regulations.

The following requirements apply to the system proposed:
- All data must be housed in the United States.
- Data that is processed, analyzed, or shared must not leave the United States boundary unless otherwise approved.

High-Level Technical and Functional Requirements

The Current System

The company has outgrown the current environment, which includes a disconnected set of custom-built tools in spreadsheet software and database management systems software, as well as many manual steps and processes. The tools are also spread across multiple offices and have many team members who work remotely.

The company prefers to keep existing business processes as much as possible; however, where there is justification for change that makes the implementation of the system feasible or more efficient, it will be acceptable. When possible, the solution should be adaptable (configurable) to specific processes.

It is also preferred that the internal infrastructure remain as much intact as possible. The company is open to alternative suggestions where the benefits are clearly demonstrated.

General Requirements

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The system will have the ability to:
- archive information without deletion to maintain historical records.
- maintain versions of records with auditing, workflow, and roll-back.
- record activity against individual users for auditing and process.
- "soft delete" data (i.e., remove data from view without actually removing the data).
- "hard delete," which is restricted to specific roles/permissions.
- accurately control data access, workflow, and editorial control based on user permissions.
- integrate with the active directory server of the company.

Hosting

The company is open to recommendations for cloud-based solutions and subscription-based models. If the proposed solution is hosted, the proposal must include a clear demonstration of how connectivity outages, service level agreements (SLAs), upgrades, custom development, ability to refuse upgrades, support, and maintenance will be handled. An environment where enhancements or changes can be tested prior to deployment of production must also be provided.

Users

The company has 2,000 users who will access the system. On average, 500 may concurrently be using the system during peak times. This will change moderately over time, so a system that is scalable to meet the needs of a growing user base is important. Performance standards must also be met.

OS and Browser Support

The system must be compatible with the below list of operating systems and browsers.

- latest Chrome and Chromium
- latest Firefox
- I.E 9 and above
- Safari 6.0
- mobile & tablet
- iOS7 Safari
- iOS7 Third Party Browsers (Chrome and Firefox)
- Android 4.0 Chrome

Contact Management

Users will be categorized as varying types of business and end user. They each have a different set of terms and conditions regarding how they may or may not be contacted. There are also specific requirements on how their details may be used.

Additionally, users will be able to manage their own contact settings, such as contact and marketing preferences, both at time of sign-up and during contact from a member of the company's team.

The following rules and requirements apply:

- Businesses should exist as a single overarching entity, with capabilities to detect duplication at time of entry.
- Multiple contacts can be assigned to one or more businesses and to offices or subcompanies.
- Contacts can maintain one or more roles, potentially specific to a particular business or office.

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- Contacts will move between businesses, offices, or roles.
- Contacts shall be categorized by type.
- Workflow and approval requirements are verified when creating or editing business and/or contact information.
- Partial entries are acceptable, but a mechanism should be included for flagging these entries so that they can be dealt with appropriately.
- During calls, users can tag inquiries to existing businesses and contacts, and/or a new business or contact can be created.

Ticketing System

The ticketing system allows entry and tracking of every communication and inquiry for contacts. The system must track who called, the reason, date/time, and follow up, including relevant details. Each instance must be unique, and all email replies shall be picked up by the system. The database must support the information required to facilitate the workflow and must maintain an audit trail.

Data Types

There are several data types that are required to be handled by the system. The list below is a categorization of data types, but it is a preliminary, high-level set. It will be required that a thorough and comprehensive review be conducted with the vendor that is awarded the contract to ensure all data types and details are identified.

- Stakeholders: This is anyone the company interacts with, which can be an individual, organization, and/or business.
- Businesses: This refers to the organizations that are supported by the company within the industry. It may include gamers, sales outlets, distributors, and marketing and sales personnel. Business entities will include address(es), phone number(s), and other relevant information.
- Contacts: This category is wide reaching; it can be any individual within CRM. It may be first contact or later, depending on the individual.

The database will need to be scalable for business growth, which translates to data growth. The proposal must demonstrate how new fields and relationships can be maintained to allow this growth and deliver reporting capabilities accordingly while maintaining performance.

Reporting

The new CRM should be capable of delivering both predefined and custom reports on all the data within the system. The reporting capability shall have a user interface that will allow for filtering, formatting, querying, and exporting of data.

The following reporting capabilities are required:

- Detailed and higher-level reporting capabilities, including dashboards and executive-level summary reports.
- Clicking through the data that is displayed.
- User access to data that is relevant for the user's department or function.
- Saving reports for future access.
- Saving and reuse of filters so that individual users can tailor reporting.
- Historical data reporting.

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Sales Tracking

Activity Management—Visits and Meetings

The CRM system must be a central repository for holding all data on visits and meetings to/with stakeholders by any/all members of the company.

The following high-level requirements apply:
- The system shall have one-way or two-way communication between the CRM and MS Exchange/Outlook.
- The system shall have ticket system functionality with an effective workflow to cover any interaction with the contact; it must also include an audit trail.
- The system shall efficiently export and re-import data and will include appropriate validation with minimal risk.

Opportunity Management

Opportunity management plays a significant role in a CRM system. It gives sales teams the ability to track sales processes, manage pipelines, and do competitive analyses.

The system shall have the capability to:

- implement workflow and activities for the sales process.
- establish and track the pipeline.
- perform win/loss analysis, competitive analysis, competitive product analysis, and discount approval and analysis.

Quoting

The following are required:

- quote generation and assembly
- discounting, tax, and freight costs
- currency
- electronic signature
- configure price quote (CPQ) and configure pricing
- substitution
- inventory/product availability
- shipping forecast
- contract pricing
- price catalog
- quote delivery

Forecasting

Forecasting is the process of predicting sales and revenue. Managers look to forecasts to help manage the revenue expectation of the company and to eventually predict profitability.

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The following apply:

- currency adjustments (applies to foreign)
- baselining (snapshot view of forecast and compare to another forecast)
- manager adjustments
- upside
- machine forecasting
- sales distribution
- forecast periods
- product forecasting

Order Management

Order management is the process of turning a quote into an order and completing a sale.

The following apply:

- order tracking
- taking orders
- converting quotes to orders
- reordering
- part ordering
- customer self-serve (i.e., portal)

Contracting

For every deal, there's a contract. Contracting tracks the process of creating, signing, and approving the contracts. Think about your company's contracting processes and how that factors into your CRM requirements for sales management.

Consider the following:

- contract creation
- signing
- term tracking
- termination
- approval/authorization

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