Customer Relationship Management System
Version 1.2
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1. Business Requirement Overview

The proposed system will solve the issues arising from manual tracking of travel leads and the efficiency of staff in managing these travel leads. Therefore, the end goal is to create a software application, which would enable end to end tracking of travel leads from its source until the realization of revenue by converting the same in to a customer.

2. Proposed Solution Overview

a. Overview

The proposed system involves implementing a Customer Relationship Management System, where data from customer touch points shall provide information for Expats Holidays in order to manage travel leads efficiently.

b. Purpose of Solution

Main purposes of the proposed solution;

- To have accurate data and information for making decisions
- Reduce the time required to enter data manually
- Reduce manual maintenance of Excel sheets and other documents
- To generate reports efficiently
- To exceed customer expectations

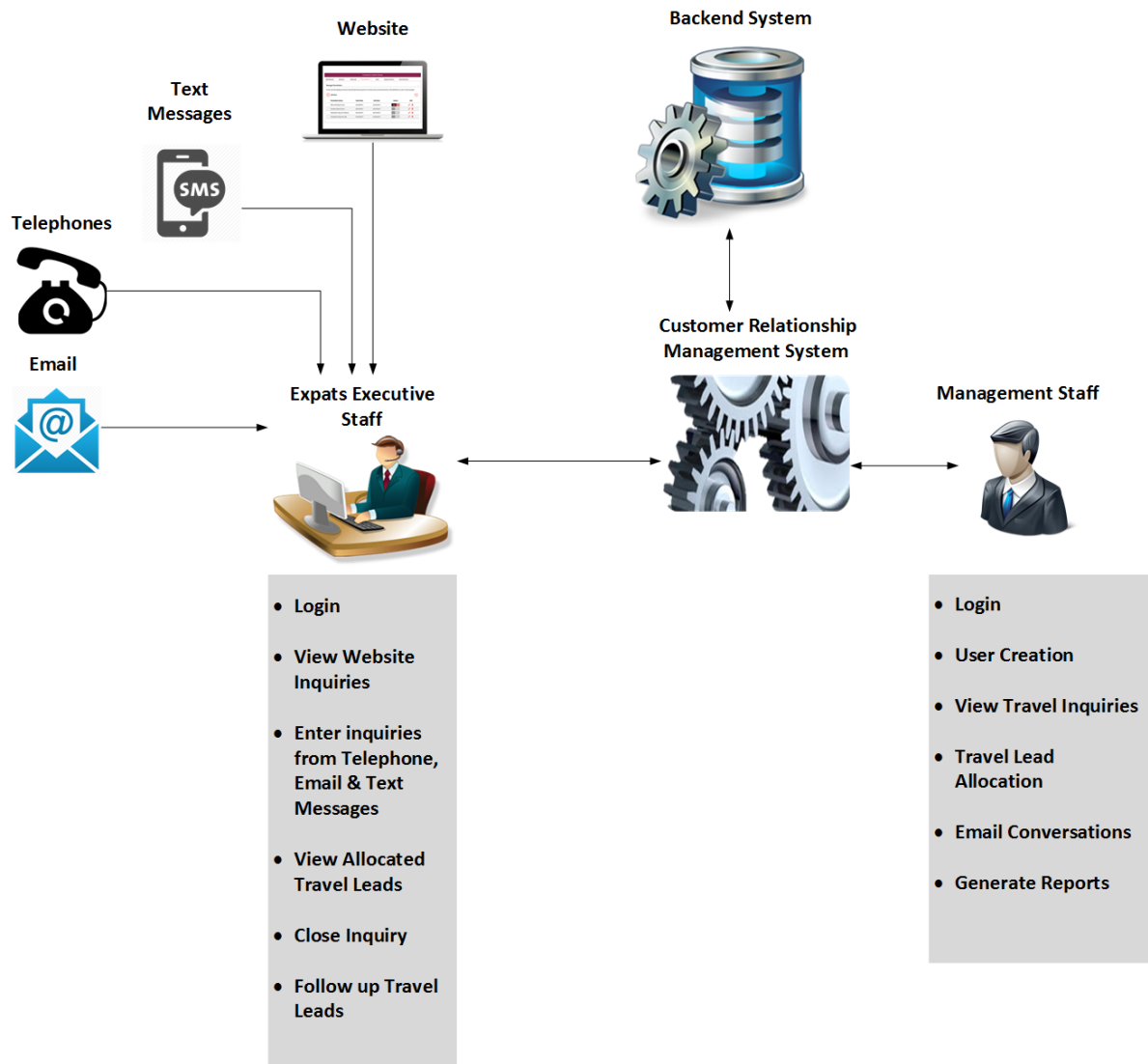# 3. System Modules

a. High level solution approach

Figure 1: System Flow Diagram of CRM System

4. CRM System Features

a. What's included in the scope of this solution

1. Login Page

a. Login

Authorized users will provide relevant credentials to login the system. System will verify the credentials and authorize the User.

b. User Management

Management users can create/update/delete other users.

2. Home Page

Home Page is the landing page of the overall system. This page shall be the central page that allows the user to browse to all components of the system via navigation.

3. Executive Staff Features

a. View Website Inquires

Website inquiries will be displayed in the system.

b. New Inquiry Entry

Inquiry forms will be displayed to enter inquiry details per customer.
Following is the inquiry sources

- Email
- Telephone
- Text Messages

c. View Allocated Travel Leads

Once the management staff has allocated the travel inquiry to a staff member, the staff member will be able to view particular lead.

d. Email Conversation Integration

System shall be allowed executive staff to communicate with their customers via the email. Email thread will attach to a particular travel lead until the inquiry is closed.

e. Follow up Travel Leads

Expats staff will be able to mark follow up statuses via the system.

f. Close Inquiry Lead

Once the Travel lead process has finished, Expats staff will be able to close the inquiry via the system.

4. Management Staff Features

a. View Travel Inquiries

Inquiries which are entered by the Expats executive staff will be displayed in the system.

b. Travel Lead Allocation

Management staff shall allocate travel lead to a particular Expats staff via the proposed system.

5. Reports

3 management reports have been scoped for this engagement.

c. Exclusion/s

i.   Payment Platforms will not be integrated

d. Dependencies

1.   Website Integration