***Project Requirements***

***Technical Requirements***

1. **Customer Data:**

* Personal Information: Names, email addresses, phone numbers, demographics (age, gender, location), job titles, company names, etc.
* Historical Interactions: Previous inquiries, purchases, interactions with customer support, feedback, etc.
* Behavioural Data: Website visits, clicks, downloads, time spent on pages, products viewed, etc.
* Social Media Data: If applicable, information from social media profiles and interactions.

1. **Sales Data:**

* Transaction Data: Details of sales transactions including product/service purchased, quantity, price, discounts, etc.
* Lead Data: Information about leads, prospects, and opportunities including contact details, lead source, status, etc.
* Sales Pipeline: Stage of each lead in the sales pipeline, expected close dates, probability of closure, etc.
* Sales Performance Metrics: Revenue, profit margins, conversion rates, average deal size, sales velocity, etc.

1. **Marketing Data:**

* Campaign Data: Details of marketing campaigns such as email campaigns, social media campaigns, advertisements, etc.
* Engagement Metrics: Click-through rates, open rates, conversion rates, impressions, reach, etc.
* Content Performance: Performance metrics for content assets such as blog posts, videos, whitepapers, etc.
* SEO Data: Keyword rankings, organic search traffic, backlinks, etc.

1. **Business Development Data:**

* Partnership Data: Information about partnerships and collaborations including partner organizations, agreements, contact persons, etc.
* Market Research Data: Market trends, competitor analysis, SWOT analysis, industry reports, etc.
* Networking Data: Contacts from networking events, conferences, industry associations, etc.
* Opportunity Data: Potential business opportunities, expansion plans, target markets, etc.

1. **External Data Sources:**

* Industry Data: Data from industry databases, reports, and research organizations relevant to your client's sector.
* Publicly Available Data: Data from public sources such as government databases, trade publications, news articles, etc.
* APIs: Data from third-party APIs such as weather APIs, financial data APIs, social media APIs, etc. that may be relevant for contextual information or personalization.

1. **User Interaction Data:**

* Chat Logs: Logs of interactions between users and the bot, including user queries, bot responses, user feedback, etc.
* User Preferences: Preferences expressed by users during interactions, such as preferred communication channels, product preferences, etc.
* Sentiment Analysis: Analysis of user sentiment based on their interactions with the bot.

1. **Compliance and Regulatory Data:**

* GDPR Compliance: Data related to GDPR compliance efforts, including consent management, data processing agreements, etc.
* Legal Documentation: Relevant legal documents such as terms of service, privacy policy, etc.

***Milestones***

**1. Initial Planning and Research Phase**

Time Frame: **2 weeks**

Activities:

* Detailed consultation with the client to understand specific requirements and expectations.
* Researching existing CRM systems, marketing automation tools, and APIs suitable for the project.

Deliverables:

* Comprehensive project plan outlining technical requirements, data sources, and integration strategies.

**2. Development of Bot Prototype**

Time Frame: **6 weeks**

Activities:

* Designing and implementing a prototype of the marketing, sales, and business development bot.
* Integration with relevant APIs for functionalities such as lead generation, customer segmentation, and automated responses.

Deliverables:

* Functional prototype demonstrating core bot capabilities.

**3. CRM System Development**

Time Frame: **10 weeks**

Activities:

* Custom development of CRM system tailored to client's requirements.
* Integration with third-party tools and APIs for data collection, analysis, and reporting.

Deliverables:

* Fully functional CRM system with user-friendly interface.

**4. Testing and Iteration**

Time Frame: **2 weeks**

Activities:

* Rigorous testing of both the bot and CRM system to identify and rectify any bugs or issues.
* Client feedback collection and implementation of necessary changes.

Deliverables:

* Bug-free and optimized bot and CRM system ready for deployment.

**5. Deployment and Training**

Time Frame: 1 week

Activities:

* Deployment of the bot and CRM system to client's infrastructure.
* Training sessions for client's team on how to effectively use and manage the systems.

Deliverables:

* Successfully deployed and operational bot and CRM system.

**6. Maintenance and Support**

Time Frame: Ongoing (1 month post-deployment)

Activities:

* Providing technical support and assistance for any issues that may arise.
* Minor updates and maintenance as required.

Deliverables:

* Continuous support ensuring smooth operation of the systems.

***Non-Technical Requirements***

1. **Clear Project Scope:**

Provide a detailed outline of the project scope, including specific functionalities and features required in the bot and CRM system.

1. **Timely Feedback and Approval:**

Commitment to providing timely feedback on project deliverables and approving milestones promptly to ensure project progress is not hindered.

1. **Resource Allocation:**

Allocate necessary resources such as access to data sources, APIs, and infrastructure required for development, testing, and deployment.

1. **Data Provision:**

Furnish relevant customer data, sales data, marketing data, and any other datasets necessary for the development and testing of the bot and CRM system.

1. **Collaborative Engagement:**

Engage collaboratively throughout the project lifecycle, offering insights, preferences, and requirements to ensure the final product meets business objectives effectively.

1. **Testing and Validation:**

Participate in the testing and validation process by providing feedback on system functionalities, user interfaces, and overall user experience.

1. **Training and Documentation:**

Allocate time for training sessions to ensure the client's team is adequately equipped to operate and manage the bot and CRM system post-deployment.

Provide necessary documentation, including user manuals and guidelines, for reference and troubleshooting purposes.

1. **Budget Adherence:**

Adhere to the agreed-upon budget and payment schedule outlined in the contract, ensuring timely payments for completed milestones.

1. **Confidentiality and Security:**

Maintain confidentiality and security of proprietary information and sensitive data shared during the project collaboration.

1. **Long-term Partnership:**

Express commitment to fostering a long-term partnership beyond the project duration, including support for ongoing maintenance, updates, and enhancements as needed.