

CRM REWRITE

LE GROUP UNE

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What is a CRM?

- Customer Relationship Management

- Collects User Data

- Maximize sales
 - Customer retention

- Organize Relationships with Individuals



Problem Statement

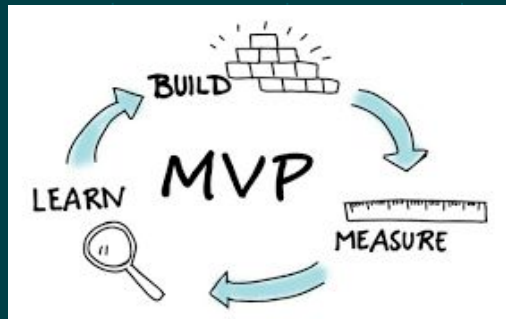
- **Sell-IT the producers of a CRM software have:**
 - Failed to keep up with competitors
 - Recently hired a new CEO and staff
- **Why was it bad?**
 - Not tailored to clients' needs
 - Overall outdated
- **They want to:**
 - Rewrite the entire program
 - Release it to market as soon as possible



Goals & Benefits

Goals

- Easier Use of System
- Optimize Workflows
- Modular Design
- In-depth Analysis of System
- Minimal Viable Product (MVP)
 - Marketed and Deployed
 - 1 Year



Benefits

- Increase Clients' Satisfaction
- Easy to Maintain
- Features Users will Actually Use
- Cater to Each Client's Needs



Scope

Project Must Include (MVP)

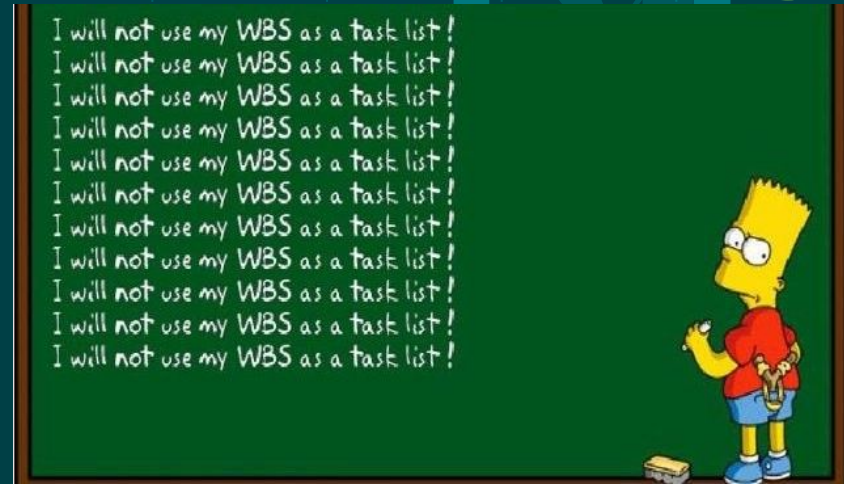
- Must integrate with existing systems
 - Salesforce, Sharepoint, Oracle ERP
- Multiple workflows:
 - Data collection & analysis
 - Marketing tasks
- Manage customers
- Track client's purchases products & services
- Organize elements into personalized group
 - metadata filtering, analytics, events & message notification
- Single sign On
- Import real-time data

Project Will Not Include

- Hardset Features that does not allow a modular design
- AI Engine to analyze aggregated data
- Analysis of psychographic factors and demographics
- Proof of concept sign-off, planning, & tracking
- Free version of the software outside of testing/trial period
- Mobile version
- Different pay tiers outside of extending functionality
- Full built-in training seminar

WBS

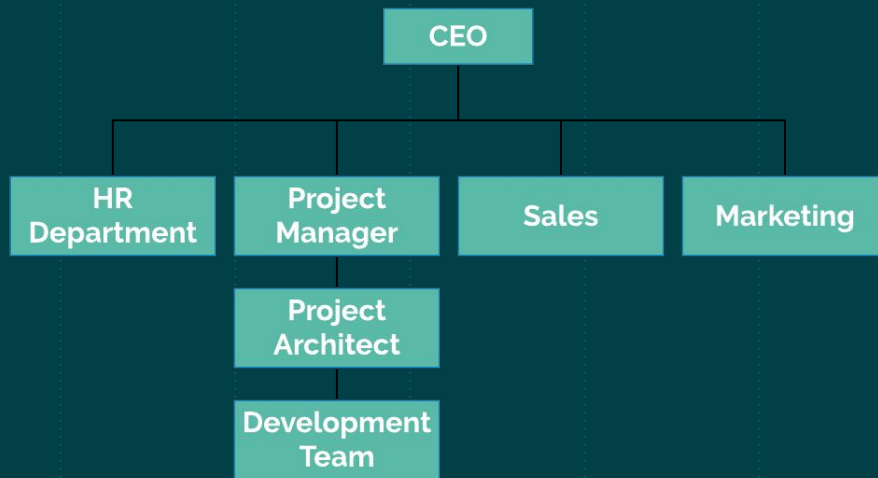
1. Sell-IT Customer Relations Management Program
2. Create Concept
 - 2.1. Gather Requirements
 - 2.2. Evaluate Previous Version
 - 2.3. Create Risk Management Plan
3. Design System
 - 3.1. Create Product Timeline
 - 3.2. Model System Architecture
 - 3.3. Establish Coding Standards
4. Develop Product
5. Test Product
 - 5.1. Define Objectives
 - 5.2. Create Testing Suite
 - 5.3. Perform Tests
6. Roll Out
 - 6.1. Perform Retrospective
 - 6.2. Meet with customers for insight
7. Support / Control



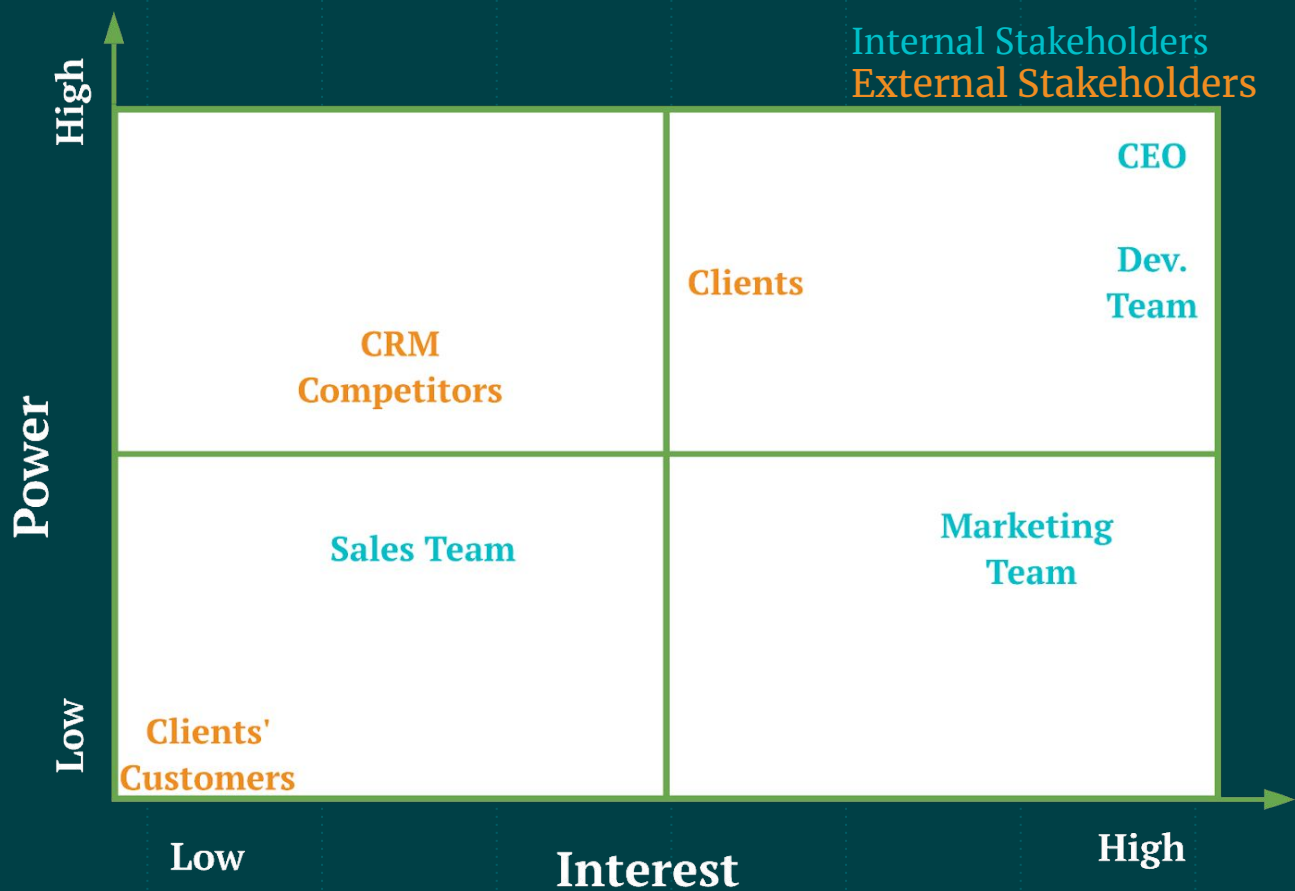
Our Company

- **CEO**
 - The new head of the company.
- **HR Department**
 - Currently only two people.
- **Project Manager**
 - Organizes and manages the development of the Sell-It Product.
- **Project Architect**
 - Works closely with the dev team on the actual creation of the product.
- **Development Team**
 - Make the actual program.
 - Currently only five people.
- **Sales**
 - Bring in customers to test and hopefully buy the product.
 - Only three people so far.
- **Marketing**
 - Creates the brand. Currently focused on revamping to be modern and fresh.
 - Two people have been hired so far.

Sell-IT Company Structure



Stakeholders



Chosen Methodology

Feature-Driven Design (FDD)

- Agile
 - Modular
 - Customer Feedback
- Emulate Start-up Culture
- Easy Team Expansion
- Address Customer Needs Quickly
- MVP
 - add new features as they are finished
- More Rapid Development
- Manageable
- Requires Fewer Meetings



Timeline



How We Operate

Sprints

3-4 weeks long

Mandatory Team Meetings

Every Monday,
Wednesday and Friday

*Monday Snacks

Non - Mandatory

Team Meetings

Only require parties
involved

Mandatory Upper management Meetings

Tuesdays of the first and
third weeks of the
month



Communications Plan

Statuses to communicate

- Status of Project
- New Risk
- Risk Averted
- Addition to Scope
- Removal from Scope
- Change to Team
- Results of Likert Test
- Number of defects

Metrics to communicate

- Number of defects found after a release
- Test coverage of specification
- User or customer satisfaction
- Module Complexity



Excellent communicators
are not born - they are made.

Biggest Potential Risks

- Developer goes on vacation right before critical feature release
- Large feature is introduced
- Company has layoffs and team is cut in half
- New CEO mismanages the company



Questions?

