

**Business Requirements Document (BRD)**  
**CRM System Upgrade Project**  
**Company:** Digital Transformation Consulting  
**Version:** 1.0  
**Status:** Draft  
**Prepared by:** Business Analyst Team  
**Date:** June 25, 2025

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**1. Executive Summary**

**1.1 Project Overview and Business Justification**

Digital Transformation Consulting aims to modernize its customer relationship management (CRM) capabilities by upgrading its legacy CRM system to a modern, cloud-based solution. The current system lacks scalability, integration flexibility, and advanced analytics, which limits the efficiency of sales, marketing, and customer support teams. The proposed upgrade will streamline operations, enhance customer engagement, and support data-driven decision-making.

**1.2 Expected ROI and Timeline**

**Return on Investment (ROI):**

- 20% improvement in sales conversion rate
- 30% reduction in manual data entry through automation
- 25% increase in marketing campaign effectiveness

**Timeline:**

- **Initiation & Planning:** July 2025
- **Requirements & Design:** August 2025
- **Implementation & Migration:** September–November 2025
- **User Training & Go-Live:** December 2025

**1.3 Key Stakeholders and Success Criteria**

Stakeholder	Role
Chief Technology Officer	Executive Sponsor
Director of Sales	Business Stakeholder
IT Systems Manager	Technical Lead
Marketing Automation Lead	Integration Partner
Customer Service Manager	End-User Representative

**Success Criteria:**

- 100% user adoption within 60 days post-launch

- Seamless data migration with zero data loss
  - Integration with email, calendar, and marketing tools
  - System uptime of 99.9% post-implementation
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## 2. Business Context

### 2.1 Current CRM System Limitations

- Inability to integrate with third-party marketing platforms
- Outdated UI with limited mobile support
- Manual reporting prone to errors and inefficiencies
- Lack of real-time sales pipeline visibility
- No built-in automation for lead nurturing or follow-ups

### 2.2 Business Impact of Existing Challenges

- Delayed customer follow-up affecting deal closures
- Inefficient sales reporting leading to misaligned forecasting
- Lost opportunities due to poor visibility into pipeline stages
- Marketing campaigns are not tailored due to lack of segmentation tools

### 2.3 Strategic Alignment with Company Goals

- Supports the corporate goal of "Customer-First Innovation"
  - Enables data-driven decision making across sales and marketing
  - Aligns with IT modernization roadmap (cloud-first architecture)
  - Promotes operational efficiency through intelligent automation
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## 3. Functional Requirements

ID	Functional Requirement	Priority
FR-001	The system shall allow users to create, view, update, and delete comprehensive customer profiles.	Must Have
FR-002	The system shall support sales pipeline management with drag-and-drop stage movement.	Must Have
FR-003	The system shall provide customizable reporting and dashboard capabilities for sales performance.	Must Have

ID	Functional Requirement	Priority
FR-004	The system shall integrate with Mailchimp and HubSpot for marketing campaign management.	Should Have
FR-005	The system shall provide responsive mobile access on iOS and Android devices.	Must Have
FR-006	The system shall support automated workflows for lead qualification, follow-ups, and task assignments.	Must Have
FR-007	The system shall provide role-based access control to restrict data visibility based on user roles.	Must Have
FR-008	The system shall support synchronization with Microsoft Outlook and Google Calendar for activity tracking.	Could Have

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## 4. Non-Functional Requirements

### 4.1 Performance Requirements

- System shall load dashboard pages in under 3 seconds.
- Must support at least 200 concurrent users without performance degradation.

### 4.2 Security Requirements

- All customer data shall be encrypted in transit and at rest using AES-256.
- System shall include SSO integration with company's identity provider (e.g., Azure AD).
- Role-based access control must be enforced at the field and module level.

### 4.3 Reliability and Availability Requirements

- System shall have a minimum uptime of 99.9%.
- Automated daily backups shall be retained for a minimum of 30 days.
- Disaster recovery procedures shall enable system recovery within 2 hours of failure.

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## 5. Implementation Considerations

### 5.1 Technical Constraints

- The CRM must be a cloud-based SaaS solution.
- Existing data formats (CSV/XML) must be supported during migration.
- CRM platform should be compatible with existing Windows-based desktops and Office 365 tools.

### 5.2 Integration Requirements

- Integration with existing ERP system (SAP) for order and invoice sync.
- Real-time sync with marketing tools (HubSpot) and customer support software (Zendesk).

**5.3 Training and Change Management Needs**

- Customized training sessions for sales, marketing, and customer support teams.
- A comprehensive user guide and helpdesk support available post go-live.
- Change management plan to include communication strategy, champions program, and feedback loop.

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**6. Appendix**

**6.1 Acronyms**

**Abbreviation Description**

CRM	Customer Relationship Management
SSO	Single Sign-On
ERP	Enterprise Resource Planning
UI	User Interface
AES	Advanced Encryption Standard

**6.2 Document History**

Version	Date	Description	Author
1.0	2025-06-25	Initial Draft	BA Team

