



University Name

# Project Management Assignment #1

By: **Your Name**

Your full name here

Your field here

other

## **Project Objectives**

- Improve the Buyer's Journey

The fundamental purpose of a CRM system is to enhance the customer experience. By making improved customer satisfaction the main goal, all other objectives work to support this overarching aim.

- Enhance Customer Retention

A well-implemented CRM system can significantly impact customer retention. Use it to track customer interactions, preferences, and feedback.

- Streamline Communication and Collaboration

Break down silos within your organization by using the CRM to facilitate transparent communication and collaboration.

## **Project Description**

- The project involves the selection, customization, and deployment of a CRM system that aligns with the company's strategic goals. The CRM will be integrated with existing systems to provide a seamless user experience.

## **Roles and Responsibilities**

- The Project Sponsor will provide oversight and strategic direction.
- The Project Manager will oversee the day-to-day operations and ensure the project remains on schedule and within budget.
- The CRM Implementation Team will be responsible for the technical aspects of the CRM setup, including system configuration, data migration, and user training.
- End Users will provide feedback and participate in user acceptance testing.

## **Assumptions and Constraints**

- The project assumes that all necessary resources will be available as planned.
- A key constraint is the project timeline, which is fixed due to market competition.

## Tasks

- **Initiation** is the first phase in which the project's worth and viability are assessed. Key processes include determining the need for a CRM system, defining project objectives, and creating a project charter outlining the project's purpose, objectives, and stakeholders.
- **Planning** During this phase, a complete project plan is created, including the scope, objectives, and procedures for the CRM project. It include creating schedules, predicting expenditures, and arranging resources and risk management measures.
- **Execution** This phase entails creating and implementing the CRM system. The tasks include configuring the software, integrating it with existing systems, and ensuring that all project deliverables are completed in accordance with the project plan.
- **Monitoring and Control:** This phase runs concurrently with the execution phase and entails tracking the project's progress and performance to ensure that everything is in line with the project management plan. Adjustments are performed as needed to maintain control over the scope, timeline, prices, and quality.
- **Closure** The last phase signals the end of the project. It entails handing over deliverables, releasing project resources, and assessing the project's success versus its initial goals. A post-implementation evaluation is also undertaken to document the lessons learnt.

## Approval

- This charter has been approved by the project sponsor and key stakeholders, signifying the official launch of the CRM Implementation Project.

## Timeline

