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| Scenario: CRM Sales Management |
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**The ‘go-crm’ is a mid size company which is into creating crm marketing and sales softwares for mid size companie’s marketing and sales departments. the company is very clear with their vision and defined an elevator statement which tells about their product offering. DUring their product development PHASE, the company came up with the list of key features that they want to build in the CRM innovator product.**

**The elevator statement created in collaboration with the stakeholders is;**

"For a mid-sized company's marketing and sales departments who need basic CRM functionality, the CRM-Innovator is a Web-based service that provides sales tracking, lead generation, and sales representative support features that improve customer relationships at critical touch points. Unlike other services or package software products, our product provides very capable services at a moderate cost."

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| **The list of requirements to build the CRM innovator product are;** |
| Opportunity Management |
| Sales process |
| Pipeline |
| Won/Lost analysis |
| Competitive analysis |
| Competitive product analysis |
| Discount approval & analysis |
| Activity Management |
| Activity tracking |
| Calendar |
| Activity reporting |
| Trip reporting |
| Quoting |
| Quote generation & assembly |
| Discounting, tax, & freight costs |
| Currency |
| Electronic signature |
| CPQ, configure pricing |
| Substitution |
| Shipping forecast |
| Contract pricing |
| Price catalogue |
| Quote delivery |
| Forecasting |
| Currency adjustments (applies to foreign) |
| Baselining (snapshot view of forecast and compare to another forecast) |
| Manager adjustments |
| Upside |
| Machine forecasting |
| Sales distribution |
| Forecast periods |
| Product forecasting |
| Call Planning |
| Expense tracking |
| Time tracking |
| Routing |
| Mapping |
| 360 View |
| Email |
| Notes |
| Phone calls |
| Inbound/outbound calls |
| Meetings |
| Activities |
| Products |
| Sales history |
| Opportunities |
| Contacts |
| Cases |
| Social & News |
| Financials |
| Relationships (parent company, who’s their attorney, etc.) |
| Order Management |
| ERP integration |
| Order tracking |
| Taking orders |
| Converting quotes to orders |
| Reordering |
| Part ordering |
| Customer self-serve (aka portal) |
| Contracting |
| Contract creation |
| Signing |
| Term tracking |
| Termination |
| Approval/authorization |