

Scoping Note

SIGMA 360 project – SALESFORCE – CRM ALPHA – 2023

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I. Introduction

The scoping note aims to comprehend the current status of the project and its place within Ekovya's strategy. It's not a contractual commitment. This will enable us to schedule actions based on the customer journey and approved deadlines and allocate appropriate resources.

II. Current situation

a. Company presentation

Ekovya, a simplified joint-stock company headquartered in Lyon, has been assisting companies with their energy transition since January 2022. Under the leadership of Managing Director Mr. José GAULTHIER and Director Alexandre GAIN, Ekovya operates locally and specializes in providing services to SMEs in four key areas: innovation, consulting, communication, and solutions

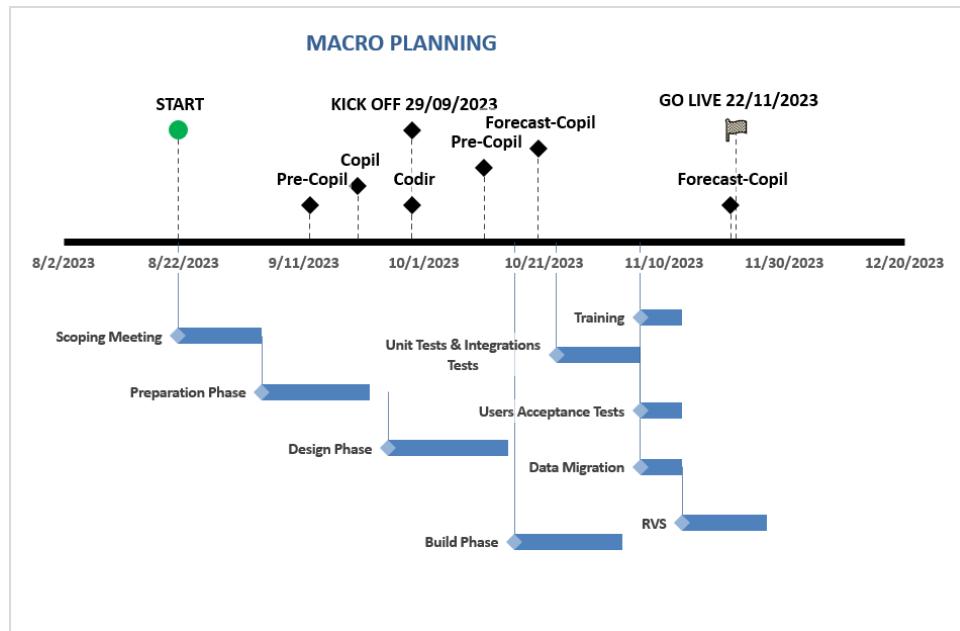
b. Objectives and purpose of the project

Ekovya's goal is to grow into a mid-sized company and eventually expand internationally. To achieve this, it has made the decision to concentrate on its marketing strategy. The primary objective is to increase the company's visibility, attract new customers, and foster loyalty among existing customers, which will lead to greater sales. Ekovya intends to achieve these goals by strengthening its sales channels and improving its commercial relationship management. To accomplish this, it plans to replace Hubspot with Salesforce as its CRM solution, while integrating it with its SAP ERP system. Additionally, the company will establish an online sales platform on its website.

III. Scope of actions

a. Planning

Based on a customer-approved timetable, the project is scheduled to occur between August 21 and December 9, 2023. This timetable delineates the project's major stages, encompassing preparation, design, construction, and delivery.



1. Preparation

Before starting a project, it's important to do some preparation work. This includes conducting a feasibility study to determine if the project is possible, analyzing the context of the project, studying the customer's needs as listed in a specification, setting deadlines based on those needs and available resources, and conducting a risk analysis. To accomplish this, there are a variety of tools that can be used such as OpenProject software for planning and monitoring, the risk matrix for analyzing risks, and the Ishikawa diagram for identifying important factors in managing the project. Once the project has been approved, the design phase can begin.

2. Design

Before commencing work in the test environment, several preparatory steps are required. This entails securing access to HubSpot, procuring licenses for Salesforce and Elementor, and conducting essential configurations. During this phase, tasks will include product sheet creation, defining technical specifications, and mapping out customer pathways. Furthermore, the examination of data migration from HubSpot and establishing the SAP-Salesforce integration will be carried out. The conceptual data schema (CDS) will also be developed, along with the management of necessary project permissions.

3. Build

During the construction phase, the e-commerce website and product catalog are developed. Following this, a series of tests are conducted, including unit tests, performance tests, usability tests, and integration tests. Upon successful completion of these tests, the pre-production phase begins. During this phase, data migration from Hubspot to Salesforce can be carried out along with the seamless integration of Salesforce with SAP.

4. Delivery

To guarantee that all users can efficiently utilize the software, we will generate comprehensive user guides and distribute them ahead of the official launch. Payment will be processed once all optimization processes are finalized.

b. Budget

For this project, we have split the expenses into two categories: material resources and human resources. Material resources will include purchasing licenses, while human resources will involve deploying consultants who will be responsible for studying and implementing the CRM solution. There will also be an indirect depreciation of IT equipment.

We have estimated the total costs to be approximately €176,676. The human resources category accounts for the highest percentage of the cost at around 97%. Licenses make up around 2% of the total cost, while depreciation of IT equipment is around 0.2%. The cost of SAP integration has been calculated separately and is estimated at €2,400.

c. Risks

Initially, project risks are documented in a table and subsequently assessed using specific criteria within a matrix. If a risk is determined to be critical, it has the potential to pose a significant threat to the project's launch.

1. Identified risks

After conducting an assessment, it was found that there are two main concerns regarding the project. Firstly, there may be unexpected additional costs which could cause financial issues. Secondly, there is a risk of human resources problems such as workload distribution and errors in time recording, which could potentially impact the project launch.

2. Preventive action

To reduce financial risk, a chartered accountant oversees the calculation of Return on Investment. To manage human risks, team meetings and task allocation are utilized and tracked in the OpenProject tool.

IV. Implementing CRM to match marketing strategy

a. Customer journey stages and actions assigned to each stage

The notion of the 'customer journey' encompasses all the stages and interactions that occur between a prospective customer and a company, starting from the initial contact, leading to the point of purchase, and extending to post-purchase loyalty. This customer journey will be outlined and managed within the Salesforce CRM system.

1. Raising awareness of the company's interests

In order to enhance its visibility, the company intends to concentrate on incorporating a fresh sales channel, namely the e-shop, which can be accessed through the website. Following that, marketing campaigns and emails will be automated. However, the consultants will not be responsible for managing social media posts or creating blog content using automation.

2. Research prospects about the company and its products

To capture the customer's attention, it's vital to employ various strategies. One of these entails creating high-quality product sheets with detailed descriptions and strategically placed keywords to enhance search engine visibility. Another effective approach involves integrating a contact form on the e-commerce website, simplifying communication between customers and sales representatives. Lastly, offering a white paper on the website, allowing potential customers to assess the quality of services and products based on feedback from other customers, can be a valuable tool. It's worth noting, however, that consultants will not be responsible for its implementation.

3. Customer selection and acquisition

After a positive initial conversation with the sales representative, the customer can create a professional account with their assistance. An email confirmation will be sent automatically. The customer can add items to their basket and use a button to generate a quote for comparison. If they choose not to compare, they can validate the basket and proceed to pay through a secure platform. After payment, the customer will receive an automated confirmation email and a thank-you email. Depending on their customer category, they may also receive discount coupons or promotional offers. It's all part of our commitment to providing excellent customer service.

4. Customer loyalty

Sustaining long-term commercial relationships is vital for the financial well-being of a company. To accomplish this, the automation of newsletters and the automated distribution of satisfaction questionnaires should be integrated. Furthermore, we will explore the feasibility of establishing an online community for potential adoption.

V. Conclusion

Ekovyva, under the leadership of Mr. Alexandre GAIN, has launched a project to enhance its market influence. This project, set to run from August 21 to December 9, 2023, is geared towards improving the overall customer experience. Through various initiatives implemented at every stage of the customer journey, Ekovyva aims to enhance business relationships and stimulate its growth. These efforts are crucial for the realization of Ekovyva's future strategic projects.