Rubber Duck Enterprises

CRM Proposal Response

Salesforce: A CRM Platform

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# INTRODUCTION

The purpose of this proposal is to advise the American Video Game Company (henceforth, the AVGC) of a software solution that will fulfil its proposed needs. The AVGC has experienced rapid growth and requires an adequate Customer Relationship Management (CRM) platform to facilitate customer contact and market growth. These needs are as established in its distributed Request For Proposals (RFP) in the CRM Requirements. This solution can be found in Salesforce, an established and successful CRM. Our objective is to provide a high functioning, simply integrated, yet user friendly solution in the platform provided by Salesforce.

## A.1. PURPOSE STATEMENT

This proposal includes our recommendation for Salesforce as a platform for the AVGC to host their increasing user and customer data needs while providing a relationship and marketing model for continued growth. In the course of this proposal we will provide multiple testing strategies and a methodology recommendation for implementing the new software and meet the companies needs for increased customer support.

## A.2. OVERVIEW OF THE PROBLEM

With the success of AVGC’s business producing massive growth the company has overgrown its current system of customer and market tracking. A comprehensive solution is a required upgrade to continue to support AVGC’s growth. Our proposal of integration with the Salesforce CRM will meet all requirements of the RFP with capacity for continued growth.

## A.3. GOALS AND OBJECTIVES

We will integrate our systems into the CRM of Salesforce as it encompasses the needs of AVGC. The system will allow for customer management and a comprehensive customer relationship software. It will provide an improved system of data sharing, reporting, and business opportunity and process flows. Just as AVGC has been ranked #1 for several years, Salesforce has been ranked as the #1 CRM for years.

We will prioritize continued growth by using a customizable CRM that is already successful and developed, wasting no time in the development process. This will allow our integration of the product to be fast and seamless.

The system is hosted in a cloud-based server using Dropbox and provide the ability to access it via any company hosted system. With access anywhere to reporting and customer information, we will be able to continue continuity in environments where our main campus or systems could go down.

We will use the Salesforce platform to produce accurate real time reports for real time opportunity management. With increased ability to produce executive reports based on consolidated information, we will be able to expect continued growth to meet our goal of 2000 users.

## A.4. PREREQUISITES

The list below displays a list of requirements before integration of the new CRM can be completed.

|  |  |  |  |
| --- | --- | --- | --- |
| Number | Prerequisite | Description | Completion Date |
| 1 | none | Contact Salesforce for pricing and a customer service representative (CSR) to present product information. | 02/01/2020 |
| 2 | 1 | Prepare meetings with the stakeholders and CSR for approval of CRM and project plan. Chose appropriate plan from cost structures and pricing plans. | 02/20/2020 |
| 3 | 1, 2 | Attain budget approval for purchase of selected plan from Project Manager and stakeholders. | 02/28/2020 |
| 4 | 1, 2 | Meet with department managers to overview the product and the integration process. | 02/28/2020 |
| 5 | 3 | Prepare current systems for integration with new Salesforce platform. | 03/01/2020 – 03/20/2020 |
| 6 | 5 | Schedule day for system downtime to allow for maintenance and integration. | 3/30/2020 |

## A.5. SCOPE

This proposal will outline the requirements the RFP which the CRM Salesforce fully meets. This CRM will cover all the high-level requirements and functional requirements that the CRM provides as a successful software solution. Testing and integration plans are included.

The software addresses requirements found in the workflows: Activity Management, Contact Management, Data Types, Reporting, Ticketing, and Sales Opportunity Management.

The scope may be increased to include Order Management, Quoting, Forecasting, or Contracting dependent upon contract pricing with the CSR of Salesforce during negotiation. Until that time, the scope does not include these.

## A.6. ENVIRONMENT

The CRM software solution will be compatible with all operating systems and popular browsers, including:

• Chrome and Chromium

• Firefox

• I.E 9 and above

• Safari 6.0

• iOS7 Safari

• iOS7 Third Party Browsers (Chrome and Firefox)

• Android 4.0 Chrome

With cloud hosting the system will be web-based and has comprehensive continuity plans for disaster maintenance. It is capable to be accessed via and platform’s stores or browsers.

# REQUIREMENTS

The growth and development of the AVGC requires a new Customer Relationship Management program (henceforth, CRM) that can comprehensively track, chart and consolidate the different systems the AVGC currently has in use. This system must be able to be used by employees of AVGC and customers on any platform to continue to facilitate the growth and production of revenue. This platform must be an all-encompassing sales and effective customer contact tracker. This will be accomplished with Salesforce as a platform that provides:

* Contact Management – With recordable customer contact preferences and tracking.
* Sales Tracking – Opportunity Management for developing sales sources.
* Reporting with adjustable templates – For business tracking and executive reports.
* Ticketing System – Tracking all customer and business contacts for future development.
* Data Types – Protected data systems that encompass all relevant individuals and is scalable.

## B.1. BUSINESS REQUIREMENTS

The new system, Salesforce, will be capable of handling between 500 and 2000 users with the capability to support more concurrently as the AVGC continues to expand. Scalability with no loss of performance for users is a main requirement. The new system will be able to provide snapshots of customer data per the companies needs at any given moment. This data will allow salespeople to continue to develop customers and executives to plot future directives and marketing strategies.

This means advanced reporting with multiple report types for sales and executive reporting, varied formatting, and the ability to manipulate data for outside company use. These reports will be interactive and configurable per departmental or user needs with options to archive and externally save.

## B.2. USER REQUIREMENTS

The CRM will be able to sort and categorize into different business types and monitor and respond to user preferences. This information should be able to be managed by users during any contact with the company. Users will have control of when and how the company contacts them and be able to view a report of their information upon request.

## B.3. FUNCTIONAL REQUIREMENTS

The CRM will be based on an overarching business database with duplication detection and the ability to use Entity Relationship Modelling (ERM) to define categories and produce one to many and many to many relationships between users, company functions, offices, and roles. The contacts will be able to be categorized by type and be able to be edited to include multiple types of contact information.

During calls, the CRM will require mechanisms that will be in place to alert the company if there are incomplete records and require approval of editing customer or business contacts. Users at that point will also be able to flag new or current contacts for specific services or business needs. This means data access protection against user error and certain activity regulated to specific roles.

The CRM will have a ticketing system for every point of customer contact, either incoming our outgoing. The ticketing system will take inventory of each distinctive record tracking every relevant property of each contact interaction. Each record will be protected against permanent deletion unless necessary but archived to enter historical data when it becomes unused.

The system must be compatible with all modern browsers and operating systems. This includes desktop, tablets, and cellular phones. This platform functionality will also consist of secure measures to access the database. This includes encryption and secure end to end connections.

## B.4. NONFUNCTIONAL REQUIREMENTS

The system will be able to live update information from Microsoft products, including Exchange and Outlook. The contact information will be able to effectively monitor all customer interactions with an audit trail. The system will be an effective platform for displaying customer metrics with stakeholders. Customer data will have minimal risk of data theft or interruption while maintaining the ability to import and export data upon user credential validation.

# SOFTWARE DEVELOPMENT METHODOLOGY

The chosen method of creating this software in the software development lifecycle (SDLC) is the software process known as the Waterfall Methodology. This methodology is the basis of all the following methods of software creation and helped define the necessary aspects of software development. It formalizes the process of creating software and has many advantages and disadvantages that we will cover. In comparison the Agile Method uses the principles of the Waterfall Method to create a more iterative process that follows the actual progress that development follows.

## C.1. ADVANTAGES OF THE WATERFALL METHOD

The Waterfall Method comes with many advantages to the chaos involved in previous software practices. It is incremental with clear objectives of each part of its model. The objectives of each part of the process are clearly defined before beginning the process and tested for success before continuing to the next process. Each part is a necessary step between its predecessor and successor. It formalizes the objectives of the development process to provide a clear roadmap. The five steps of the Waterfall Method are: Requirements, Design, Implementation, Testing, and Maintenance. The method requires familiarity with the project and process and that each method completes successfully through each stage once. This process produces a clear understanding of the necessary parts of the software and clearly defines the end goal before the beginning. This allows for very little scope creep to exists within the software process. This produces software that isnt a mishmash of confounded ideas that can be produced when multiple hands steer the design ship.

For this project, that means that the contract will have to clearly dictate all requirements and demonstrating completion of those and only those requirements will finalize the inception of the software. Planning and staging of the process are much easier.

## C.2. DISADVANTAGES OF THE WATERFALL METHOD

The Waterfall Method also has many disadvantages due to its rigidity. Having clearly defined its objectives beforehand the Method produces software with no scope drift, but it doesn’t allow for adjustments or unforeseen requirements once the process has progressed. Any requirements not included in the Requirements phase are left out, and any Design changes found necessary when in the Implementation or Testing phase is are not added to the software without completing then restarting the whole Waterfall Method.

For this project, that means that when there are changes down the road that are necessary for a satisfactory product, we would have to start the process over again at the top of the process flow. Also, in order to get the stages of the process properly established, more time will have to be spent in each stage to thoroughly complete each stage properly.

## C.3. ADVANTAGES OF THE AGILE METHOD

The Agile Method was created in response to the issues within the Waterfall Method and other iterative types. It builds in processes for dealing with Change Management for flexibility and keeping close communication between individuals and stakeholders involved in the project. This means the agile method can accommodate change at any time and is effective for a dynamic environment. The method is also not a once over method that flows from top to bottom. Instead, it can step through the process as needed to accommodate Change Requests. This method necessitates proper and continuous communication structures. It recognizes that the stressed properties of the Waterfall Method are important but less important than a successful end goal.

For this project, this means shorter stages in each iteration of the Agile Method. The process is capable of bearing changes as the are discovered, and communication and a successful product is emphasized above all else. Changes are built into the stages with the goal of discovering all necessary changes early in development, causing a more successful program down the road.

## C.4. DISADVANTAGES OF THE AGILE METHOD

The Agile Method has only a few disadvantages, but they are large ones. First, the agile method isnt suitable for large companies and projects. Because of possibilities of frequent change, this can cause a project to drag on forever. With shorter iterations the steps of larger project development have a harder time to create forward momentum. This is expensive for stable development environments.

## C.5. BEST SUITED

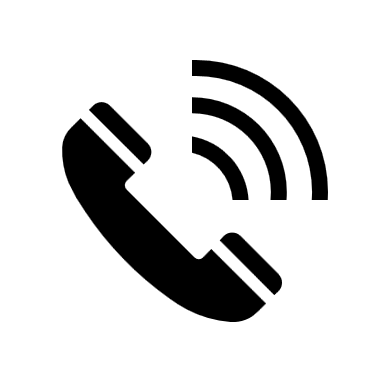
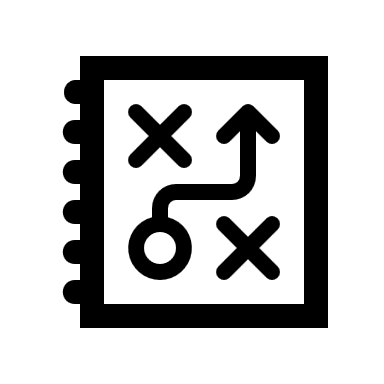
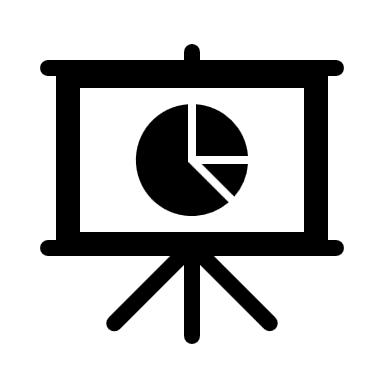
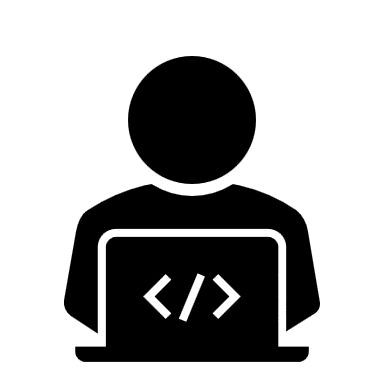
For this size of project Waterfall Methodology is best. While it doesn’t allow for much change, with properly documented requirements, the objectives of the process should be satisfactorily met without costing significantly for multiple changes like the Agile Method would. With integration being recommended over a scheduled downtime, all planning and execution of the integration must be done in one process.

# DESIGN

The software required by the AVGC will require separate platforms for the different departments using the software. This is included in the Salesforce software. As an already developed platform used by many companies, the software has been developed to comprehensively address the needs of companies like AVGC. It captures marketing data, contacts and has a ticketing system to audit contacts. Interoperability is built in allowing data to be imported, manipulated and disseminated among different departments and outside platforms per need. It is an accessible secure web platform for mobile and PC.

The program could be easily integrated into the current structure with only the need to properly transfer the data over to Salesforce. This will cause minimal disruption to business needs and allow for faster growth subsequently.

## D.1. SOFTWARE INTEGRATION PLAN



## D.2. GUI

The interface for Salesforce has been designed to be a CRM and meets the RFP criteria. It does this by providing a simple user interface and accessibility for the data encompassed in the solution. This includes all platforms and devices.

A screenshot of a social media post

Description automatically generated

The service console page provides a customer contact point for recording and responding to customer needs. It affords contacting through 2-way communication between the CRM and Microsoft exchange.

A screen shot of a computer

Description automatically generated

Customer Contacts pages are monitored, and customer information is secured yet accessible with built in scalability for additional users and no loss of performance. Contacts can decide how they are contacted and when. They can be categorized as end user or customer.

Executive level summery reports with the ability to modify the display for different aspect of marketing and sales reporting. This view includes filtering, querying and exporting data in various formats.

A screenshot of a cell phone

Description automatically generated

Opportunity management is shown through potential avenues of business as advanced AI recommends contacts and customers. It tracks sales pipelines and performs analysis on the customer data. Contract tracking and creation are available including signing and online authorization.

A screenshot of a cell phone

Description automatically generatedA screenshot of a cell phone

Description automatically generated

# TESTING

Testing the Salesforce platform for compatibility with our business needs with three test types.

## E.1. LOAD AND STRESS TESTING

We will test the capabilities of the system to be able to handle current user needs and expected user needs.

### E.1.1. CURRENT LOAD TEST

|  |
| --- |
| **Requirement Being Tested:**  Current needs include 500 concurrent users with no service degradation. |
| **Preconditions For The Test:**  Software must be installed, and all available users must be logged in at the same time and actively using the system. |
| **Steps Involved:**   1. Schedule a day for all users to be actively using the product. 2. Configure projects that will be high capacity use targets for users. 3. Make sure activity levels remain high for the duration. 4. Monitor activity levels throughout the day for and burden on the system. |
| **Expected Results:**  The software will experience no service interruptions or lag times. The speed difference for loading data will remain constant during the test and after. |

### E.1.2. SCALABIILTY STRESS TEST

|  |
| --- |
| **Requirement Being Tested:**  Possible future needs include the possibility of 2000 users. |
| **Preconditions For The Test:**  Software must be installed, and all available users must be logged in and virtual users and rewards for customers who use the system must be set up to produce similar results as over 2000 users. |
| **Steps Involved:**   1. Set up virtual systems testing to produce similar results as 2000 users on the system. This will include repetitive creation and deletion of fake customers. 2. Set up users in a high activity mode for the day and require all users to be present. Activities will include: report production, customer interaction, creation and ticketing of auditable reports any users. 3. Set up customer rewards for customers who are willing to log in and use the system and set up customer information. 4. Monitor activity levels throughout the day for and burden on the system. |
| **Expected Results:**  The test will pass if the software will experience no service interruptions or lag times. The speed difference for loading data will remain constant during the test and after. |

## E.2. PLATFORM TESTING

Testing on the multiple platforms available for mobile and office use.

### E.2.1. MOBILE AND TABLET TESTING

|  |
| --- |
| **Requirement Being Tested:**  Use of the Salesforce platform on the district OS platforms for mobiles and tablets. This test isnt testing every device type but each generic OS. |
| **Preconditions For The Test:**  Software must be installed onto various business tablets and mobile devices afforded to the companies’ users. Testing will involve the different OS platforms for device types including:   * Microsoft * Android * Blackberry * Apple |
| **Steps Involved:**   1. Install the Salesforce software from the device stores. 2. Test the user interface and functionality of the different platforms with the software by:    * Creating contacts    * Viewing marketing information    * Producing reports. |
| **Expected Results:**  The test will pass if the software will provide identical functionality cross platform and will have no unavailable services on any specific device type. |

### E.2.2. PC BROWSER TESTING

|  |
| --- |
| **Requirement Being Tested:**  Use of the Salesforce platform on a PC and Mac with various high-profile browsers. |
| **Preconditions For The Test:**  Installation of any browsers that are considered the top 5 used browsers on that OS. Company must be registered with Salesforce with a current subscription. |
| **Steps Involved:**   1. Company MAC and PC’s will have different browsers installed. 2. The browsers will each access the Salesforce platform and check for:  * Capability to log into site. * Ability to enter contact information. * Ability to print out customized reports |
| **Expected Results:**  The test will pass if the software will provide identical functionality cross platform and will have no unavailable services on any specific device type. |

## E.3. REPORT CREATION

Report creation will be tested for a variety of report types to check data analysis capability.

### E.1.2. EXECUTIVE REPORTS

|  |
| --- |
| **Requirement Being Tested:**  Create a custom report for marketing and one as an executive level growth report. |
| **Preconditions For The Test:**  Current database information must be transferred from the current system into the Salesforce system. The database schema must match the current database for datatypes and size. |
| **Steps Involved:**   1. Log into the user account with permissions for producing the reports. 2. On the dashboard go to the reporting section. 3. Create a customized marketing report. 4. Repeat the process for an executive level projected growth report. |
| **Expected Results:**  The test will pass if automatic analysis of the company database will provide accurate and usable reports. |

### E.1.2. EXPORTING REPORTS

|  |
| --- |
| **Requirement Being Tested:**  The ability of reports to be exported from the system in usable formats. |
| **Preconditions For The Test:**  The previous test. A USB formatted and large enough to hold the report. The mail application on a Microsoft system being configured. |
| **Steps Involved:**   1. Take the reports produced in the previous test and export one to a pdf format on a USB drive. 2. Using Microsoft mail, email the second report to another user account involved in the Testing. |
| **Expected Results:**  The test will pass if the USB drive and email will contain readable reports that will be able to display and use on any compatible device. |

# SOURCES

(Salesforce.com, 2020) All images are from Salesforce.com

The company has 2,000 users who will access the system. On average, 500 may concurrently be using the system during peak times. This will change moderately over time, so a system that is scalable to meet the needs of a growing user base is important. Performance standards must also be met.  
The new CRM should be capable of delivering both predefined and custom reports on all the data within the system. The reporting capability shall have a user interface that will allow for filtering, formatting, querying, and exporting of data.

The following reporting capabilities are required:

Detailed and higher-level reporting capabilities, including dashboards and executive-level summary reports.

Clicking through the data that is displayed.

User access to data that is relevant for the user’s department or function.

Saving reports for future access.

Saving and reuse of filters so that individual users can tailor reporting.

Historical data reporting.

Users will be categorized as varying types of business and end user. They each have a different set of terms and conditions regarding how they may or may not be contacted. There are also specific requirements on how their details may be used.

Additionally, users will be able to manage their own contact settings, such as contact and marketing preferences, both at time of sign-up and during contact from a member of the company’s team.

The following rules and requirements apply:

Businesses should exist as a single overarching entity, with capabilities to detect duplication at time of entry.

Multiple contacts can be assigned to one or more businesses and to offices or subcompanies.

Contacts can maintain one or more roles, potentially specific to a particular business or office.

Contacts will move between businesses, offices, or roles.

Contacts shall be categorized by type.

Workflow and approval requirements are verified when creating or editing business and/or contact information.

Partial entries are acceptable, but a mechanism should be included for flagging these entries so that they can be dealt with appropriately.

During calls, users can tag inquiries to existing businesses and contacts, and/or a new business or contact can be created.

Ticketing System

The ticketing system allows entry and tracking of every communication and inquiry for contacts. The system must track who called, the reason, date/time, and follow up, including relevant details. Each instance must be unique, and all email replies shall be picked up by the system. The database must support the information required to facilitate the workflow and must maintain an audit trail.

The system will have the ability to:

archive information without deletion to maintain historical records.

maintain versions of records with auditing, workflow, and roll-back.

record activity against individual users for auditing and process.

“soft delete” data (i.e., remove data from view without actually removing the data).

“hard delete,” which is restricted to specific roles/permissions.

accurately control data access, workflow, and editorial control based on user permissions.

integrate with the active directory server of the company.

The company is open to recommendations for cloud-based solutions and subscription-based models. If the proposed solution is hosted, the proposal must include a clear demonstration of how connectivity outages, service level agreements (SLAs), upgrades, custom development, ability to refuse upgrades, support, and maintenance will be handled. An environment where enhancements or changes can be tested prior to deployment of production must also be provided.

OS and Browser Support

The system must be compatible with the below list of operating systems and browsers.

latest Chrome and Chromium

latest Firefox

I.E 9 and above

Safari 6.0

mobile & tablet

iOS7 Safari

iOS7 Third Party Browsers (Chrome and Firefox)

Android 4.0 Chrome

Activity Management—Visits and Meetings

The CRM system must be a central repository for holding all data on visits and meetings to/with stakeholders by any/all members of the company.

The following high-level requirements apply:

The system shall have one-way or two-way communication between the CRM and MS Exchange/Outlook.

The system shall have ticket system functionality with an effective workflow to cover any interaction with the contact; it must also include an audit trail.

The system shall efficiently export and re-import data and will include appropriate validation with minimal risk.