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​​ICT311 Project Management

CRM System Implementation Project Report

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SUBMITTED TO

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# INTODUCTION:

Project Title:

CRM System Implementation for WorkingMouse

Project Sponsor:

WorkingMouse Executive Team Project Manager:

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Project Overview:

In the fast-growing firm of WorkingMouse, the effective management of client interactions is more formidable. For this purpose, the company realizes that effective client relationship management, sales procedures and support services Centralizing and optimizing can only be done through the use of advanced software. Client satisfaction, efficiency, and communication, all the above will gain more from this technology's application. The task is to develop a smart and easy to use CRM solution that is aligned with the company's future business strategy by combining it with existing technologies and training employees comprehensively.

# Project Objectives:

The primary objective of the project is to generate an up-to-date CRM system that will enable WorkingMouse to raise its capacities in customer interactions and data handling. The following are the specific objectives of the project:

* CRM Implementation: Authors a state-of-the-art CRM software of the highest quality which will serve as a hub for client information and enable the sales and customer support departments to be more efficient by decreasing the workload.
* System Integration: Ensuring that new CRM can seamlessly adapt to the existing sales and customer support technologies of WorkingMouse, subsequently it will facilitate communication between various departments and data sharing.
* User Adoption and Training: The training programs will be made and then will take them to the employees to achieve maximum system use, and to the end of change resistance away, and the increase in the production.
* Enhancement of Customer Satisfaction: Implementing the new CRM system, customer satisfaction will increase by 20% in the first 12 months.
* Project Limitations Compliance: The $300,000 AUD budget must be adhered to for the successful outcome of the project. The project must be finished within the eight-month period.

# Project Scope:

The Project scope defines the limits and deliverables of the CRM system implementation to make sure its successful completion while adhering to the specified constraints.

In Scope:

The following are the tasks and outputs that are within the scope of this project:

* Purchasing CRM software and required licenses: The next step after careful consideration was to choose and get a CRM package that would keep the business afloat while being also scalable, compliant, and adaptable for the future as well.
* Customisation and Configuration: The CRM system must be adjusted to cater to the specifications of the company in terms of operation, role given to the user, and how to get the business report.
* System Integration: Integrating the CRM system with the current marketing, sales, and customer support systems through no human intervention is the surefire way to acquire consistent and up-to-the-minute data across all the systems. Data migration is the process of moving past client information from the old CRM to the new one while preserving data security, compliance, and integrity.
* Training and Documentation: Instantly I would need to create how-to guides, professional videos, and hands-on instruction to bring the average employee up-to-speed with the new CRM system.
* Testing and Quality Assurance: By conducting thorough system testing, performance analysis, and user acceptability testing (UAT), the team will identify possible errors before the deployment phase begins.
* System launch and deployment: Through the implementation of a step-by-step plan, the user involvement is ensured, thus avoiding conflicts and the support team can still help in the post-launch phase.

Out of Scope:

The following parts are not included in the scope, to make the focus of the project clearly identifiable and to ensure its viability:

* Post-implementation maintenance: These are terms referring to the software updates, maintenance, and long-term customer support services after the original deployment period.
* Custom Add-ons: The development of new features and modules that surpass what the selected CRM system can provide.
* Hiring More Staff: The employment of additional staff to handle CRM affairs after the implementation is not part of this project.

# Project Outputs:

This project will produce all the necessities that will consider the thorough documentation and the effective implementation:

* Project Charter: Creating a document that clearly explains the overarching aims, objectives, and stakeholders involved.
* Scope Statement: Sticking with the facts, the sentence of this project will declare exactly what is stated and what is not.
* Stakeholder and Risk Register: Producing records for all the relevant stakeholders and analysing the potential project risks which involve the mitigation solutions.
* Work Breakdown Structure (WBS): Providing a detailed list of all the duties, tools, and methods, both tabular and graphical, for the purpose of designer better communication among the team.
* Project Timeline (Gantt Chart): Specifying the project schedule, it is inclusive that there are the main points, interdependencies, and deadlines to follow.
* Budget Plan: Examining every sector of the project such as expenses, resource distributions, and financial monitoring systems Group Report: Listing every team member's contribution, obstacles that were identified, and some knowledge that was obtained throughout the project duration.
* Comprehensive Project Plan: Creating a single document that connects all the project elements, thus allowing the team to properly implement, oversee, and assess it.

# Stakeholder Register:

|  |  |  |  |
| --- | --- | --- | --- |
| Stakeholder | Role | Influence | Interest Level |
| Executive Team | Sponsor | High | High |
| IT Department | Technical Support | High | High |
| Sales Team | End Users | Medium | High |
| Customer Support | End Users | Medium | High |
| CRM Vendor | External Partners | High | Medium |

# Risk Treatment Log:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Risk ID | Description | Likelihood | Impact | Mitigation Strategy |
| R1 | Data Migration Issues | Medium | High | Conduct pre-migration testing and change management support |
| R2 | Employee Resistance | High | Medium | Provide early training and change management support |
| R3 | Integration Failure | Medium | High | Involve IT experts in planning and testing |

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