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Software Development Life Cycle for CRM

# SDLC have seven phases

1. Planning.
2. Requirement and Analysis.
3. Design.
4. Implementation.
5. Testing.
6. Deploy.
7. Maintenance.

Planning:

CRM – Customer Relational Management is a highly accountable task in any organization. CRM controls and monitors the overall prospects within the organization. In CRM, there are four phases of development analysis required to accomplish the better management in Sales, Service, Operations and Management.

In sales CRM, we have proposed to develop an online website, which is to be developed in Django, Python. Entire site can only be accessed by a registered user. A registered user can enter the site and have an outlook of the entire application process. Initially user must register with the site. Once registered, the user would receive their login credential over the mail. If the registered user email has been authenticated with our system only, the user can have access to our complete site.

The registered user becomes the sales executive in an organization. Everyday, he must update his customer prospects details and the reports to be mentioned within the site along with their status and the management plan. Once successfully generated the lead with their customer, he has to offer the best quotation to vendors or any organization. The CRM software should be filled with the quotation detail and the expecting decision date follow up. If the customer obsessed with our offer. He will become our prospects for further management and to maintain long term relationship. The customer entire communication details should be stored in our backends through enquiry form.

In Sales CRM, the executive should submit the daily report along with prospectus in relation to assigned target versus monthly, quarterly, half yearly basis. The system should maintain the follow up status of every customer versus district, state, country level category. For the prospective customers, we need to generate the remainder follow up of quotation to get any order. If we have the lead, further Bank guarantee must be generated with respective bank for fund transaction. The system should maintain the follow up status for the payment within 90 days. If further delayed for what so ever, needs to be notified with the Higher-level management team. The prospect’s status of delayed payment should to again enrolled within the system. The SMS alert has to be generated with particular client, executive and top-level managers.

In Sales pipeline, Forecasting- it should be categorized based on client, sales Vs target. Unclosed sales client, their requirements and the complete forecast report should be maintained. In reports, executive should update the entire sales prospects in the system. This information is finally gathered to provide the report of future analysis and planning. The report should be categorized on Monthly sales report, Top Client Value, Monthly collection, Monthly and yearly revenue generation.