Project Scenario 1: CRM Rewrite

Note: This scenario will provide the material needed to create the artifacts as specified on the Project page. Though you will not develop the actual system, it may be a good idea to familiarize yourself with the required technology in order to produce more accurate plans.

Problem Statement

A Customer Relationship Management (CRM) producer, Sell-IT, has fallen behind and failed to right itself after being outpaced in features and services by other competitors. After cleaning the house, the new CEO has hired your team to completely rewrite their existent and outdated CRM product, trying to emulate a start-up culture. They hope to increase their clients' satisfaction, implement easier use of the system, attract more high-profile clients, and provide an in-depth analysis of system functions, for both the business itself and its clients. The CEO wants the new system to be cutting-edge and competitive, as well as easy to use and maintain. The new system must be able to be marketed and deployed as a minimum viable product as soon as possible.

At this time, there are several enterprise systems that the existing clients rely upon, making it necessary that the new product be designed with built-in integrations. This is a trend throughout the CRM industry and will need to be maintained. The old system had these integrations but also included a hard set of features, some of which some clients never used and couldn't remove; the CEO wants the new system to have modular features which can be built up over time. This will allow the business to cater and shape product instances to a client's needs, as well as sustain the business through future features.

The requirements for this system are given in the list below as either minimum viable features or desired features for the overall system. The list is neither exhaustive nor definitive. It is up to your team to develop a list of features that best fit the scope of your application. Remember, the feature set is meant to be modular and this company is currently in flux, so new features and their priorities could be added, removed, or changed.

Minimum Viable Features (MVF)

1. Workflows

   The new product must provide workflows for as many system tasks as possible, such as data collection, analysis (Desired Feature), and marketing tasks.

2. Contact & Sales Management

   The new product must allow clients to manage their customers & potential customers and track purchases of client products & services. They must be able to organize these elements [customers, purchased products & services, and potential customers] into groups with personalization features, metadata tags for filtering, analytics, and event & message notifications organized by group and element type.

3. Salesforce, SharePoint, & Oracle ERP (HR) Integration

   The new product must be able to integrate with legacy installations of Salesforce, SharePoint, & Oracle ERP. This integration includes Single Sign On, seamlessly exporting and importing data real-time, and accessing some of the other systems' features from the new Sell-IT product.

Desired Features

1. Sales Analytics & Forecasting

   The new product must have the capability of collecting data from various website traffic, social media, and the system itself to analyze marketing performance, anticipated revenue, and un-contacted potential customers for clients. This forecasting could be accomplished by developing or procuring an AI engine geared towards this function. The results of any analysis and the aggregated data must be displayed in an easy-to-use, filterable dashboard.

2. Email Integration & Analytics

   Integrating Outlook, Gmail, etc into the new product would make it very attractive for clients' who communicate with a wide range of customers. Including analytics on email and email contents from clients' customers would also provide valuable insights and increase desired feature #1's forecasting accuracy.

3. Additional Workflows

   Create optimized workflows for marketing, customer sign on, data retrieval, data analysis, and reporting. These are the CEO's current ideas for some workflows, organized by category (they will vary in complexity)

   1. Marketing
      1. Creating marketing plans
      2. Reviewing & approving/rejecting marketing plans
      3. Disseminating marketing plans
   2. Customer sign on
      1. Identifying and contacting a potential customer
      2. Proof of Concept sign-off, planning, & tracking (for point of contact)
   3. Data retrieval

      Retrieve data from

      1. Ad views & clicks
      2. Purchasing/Pricing page views
      3. Social media views
      4. News mentions
   4. Data analysis and Reporting
      1. Perform analysis
      2. Make analysis available to reporting
      3. Generate specialized reports

4. Automation

    Automating certain aspects of the sales process workflow for clients & clients' customers would make the product much more competitive. Including these automations with MVF#3's external system integrations would increase clients' productivity.

5. Lead Management

    A possible expansion and utilization of analysis capabilities, the system could save or even programmatically determine the best customers for a given client through analysis of psychographic factors as well as demographics. This would increase productivity and likely increase successful sales & marketing campaigns.

Remember, these are suggestions. Feel free to add to or modify these requirements based on the design of your system, research, and your domain analysis. Your instructor may assist you and clarify if need be.