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| Requirements Analysis Document  Dynamics CRM Online |
| **Corporate Office Solutions** |
|  |
| **Issued by: Matricia Solutions** |
| **March 20, 2012** |

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**Revision Tracking and Approval Signoff Sheet**

**Approvals**

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**Change Record**

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|  |  |  |  |

**NOTE**

Accepting this document constitutes the starting basis for the next project steps.

Other requirements encountered during the project, that are not included in this document will be included in change control documents ("Project Status Report", "Meeting Minutes", "Service Order Form").These will be examined and approved by the project managers.

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# Introduction

CORPORATE OFFICE SOLUTIONS desires the ability to see a holistic customer acquisition and sales process lifecycle and has selected the Microsoft Dynamics® CRM Online solution to create structure around marketing, account management and project sales activities. The Microsoft Dynamics CRM Online solution will be configured to compliment and support CORPORATE OFFICE SOLUTIONS general business processes as simply as possible to facilitate user adoption.

Several themes on how data should be presented were articulated during the requirements workshops and meetings. A key factor in successful CRM implementations is to ensure the initial roll out of the tool is focused in areas where there will be wide acceptance by the users of the activities with a clearly visible and positive outcome on marketing, sales and operational processes.

## Purpose

This document details the business needs of the envisioned Microsoft Dynamics CRM Online solution. The purpose of the Requirements Analysis Document (RAD) can be summarized as follows:

* It identifies and documents CORPORATE OFFICE SOLUTIONS requirements.
* It forms the basis of the system configuration.
* It forms the basis of user acceptance tests.

### Project Scope

Microsoft Dynamics CRM Online will focus on marketing and core sales force automation functions. This will include the business processes surrounding:

* Account Management
* Contact Management
* Opportunity Management
* Campaign Management
* Marketing Lists
* Activity Management

### Project benefits

By implementing Dynamics CRM Online, CORPORATE OFFICE SOLUTIONS will be able to achive the proposed business objectives:

* consolidate and centralize critical customer data
* increase support for sales and marketing representatives
* improve communication and information flows
* increase customer satisfaction and retention
* plan and execute marketing campaigns
* automate the reporting and analytics tasks

## Assumptions and Constraints

* CORPORATE OFFICE SOLUTIONS will be able to commit the proper resources to the project on a timely basis.
* Executive sponsorship will be strong enough to drive users to use the solution.
* Go-Live date targeted 8 weeks out, but no later than May 14th , 2012.

## Project Timeline

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Stage | Task | W1 | W2 | W3 | W4 | W5 | W6 | W7 | W8 |
| 1. Analysis | Kick-off & business requirements analysis |  |  |  |  |  |  |  |  |
| Requirements analysis document |  |  |  |  |  |  |  |  |
| Document validation |  |  |  |  |  |  |  |  |
| 2. Project Organization | Project Organization (detailed project plan) |  |  |  |  |  |  |  |  |
| 3. System Configuration | System Deployment (installation or online site activation) |  |  |  |  |  |  |  |  |
| Implementation team training on standard features |  |  |  |  |  |  |  |  |
| System Configuration |  |  |  |  |  |  |  |  |
| Configured System Documentation |  |  |  |  |  |  |  |  |
| 4. System Testing | Training for the testing users |  |  |  |  |  |  |  |  |
| System Test, Fine-Tuning and Acceptance |  |  |  |  |  |  |  |  |
| 5. Training | Users training on configured system |  |  |  |  |  |  |  |  |
| Training on reports design & administration |  |  |  |  |  |  |  |  |
| 6. Data Migration & Go-Live | Support for data migration |  |  |  |  |  |  |  |  |
| Go-Live Support |  |  |  |  |  |  |  |  |
| 7. Project Management | Project Management |  |  |  |  |  |  |  |  |

# Microsoft Dynamics CRM Online Functional Requirements

The following tables outline the requirement specifically around the CORPORATE OFFICE SOLUTIONS Marketing and Sales Force Automation functionality.

## Global Entities

### Account Management

The CRM Account entity will store information about prospects, clients, suppliers, architects, constructors, press and others. The information will be segmented and identified by using the entity attribute fields described in the following table.

|  |  |  |
| --- | --- | --- |
| **Ref** | **Attribute Name** | **Description** |
| **1.** | Account Name | Name of the account;  Mandatory |
| **2.** | Relationship Type | Mandatory;  Possible options:   * Prospect * Client * Architect * Constructor * Developer * Press * Supplier * Reseller * Real estate agent * Project Management |
| **3.** | Account Number | Read only;  Will be maintained automatically by the system through a custom plugin that will set the account number on a client record when the first order is registered |
| **4.** | Primary Contact | Mandatory Lookup to Contact entity |
| **5.** | Parent Account | Lookup to Account entity |
| **6.** | Main Phone |  |
| **7.** | Other Phone |  |
| **8.** | Fax |  |
| **9.** | Email |  |
| **10.** | Web Site |  |
| **11.** | Description |  |
| **12.** | Industry | Mandatory Possible Options:   * Accounting * Business Services * Consulting * Financial * Insurance * Service Retail * Transportation * Wholesale * ... |
| **13.** | Annual Revenue |  |
| **14.** | No. of Employees |  |
| **15.** | Territory | Lookup to Territory entity  Used for geographical segmentation |
| **16.** | Category | Possible Options:   * Strategic * Regular |
| **17.** | Owner | Lookup to User entity |
| **18.** | Contact Method Preferences | Marks the channels of communication that a customer prefers |
| **19.** | Originating Lead | Lookup to Lead entity  Shows if the Account record was promoted from a Lead |
| **20.** | Last Date Included in Campaign | The last date that the Account was included in a marketing campaign |
| **21.** | Send Marketing Materials | Indicates whether the customer wants to receive marketing materials |
| **22.** | Year Became Client | The year in which the Account record became a client |

#### Connections

The CRM standard Connections functionality will be used to create relationships between different Account record types. Connections are a free form of relationships between records that can be used to connect any type of record to any other type of record. Multiple roles and connections can be created for a particular record.  For example an account may have many relationships with other entities and may play a different role in each of those relationships.  Connection roles can also be categorized by business, family, or social.

Specifically, this functionality will be used to link architects, constructors, influencers, competitors and so on to prospects and clients. This will allow for an overview of all relationships that an account record has with the others. For example, it will be possible to see all prospects and clients related to a particular architect.

When creating a relationship between two records, one must select the connection role of each record and can also enter a short description of the relationship.

The connection roles initially available in the system are summarized in the following table. It is also possbile to expand these roles as need may arise in the future.

|  |  |  |
| --- | --- | --- |
| **Connection Role** | **From** | **To** |
| Architect | Account | Account, Building |
| Constructor | Account | Account, Building |
| Developer | Account | Account, Building |
| Influencer | Account | Account, Opportunity |
| ... |  |  |

#### Addresses

It is possible to define one or more address records to each account. Each account will have one primary address, and can have any number of additional addresses of different types (billing address, shipping address, and others). The primary address will be defined on the main Account entity form, and the additional addresses will be defined in the More Addresses section of the Account form.

Each address record will contain the following attribute fields:

|  |  |  |
| --- | --- | --- |
| **Ref** | **Attribute Name** | **Description** |
| **1.** | Address name | Mandatory |
| **2.** | Address type | Possible options:   * Primary * Billing * Shipping * Can we have multiple shipping / billing etc addresses? |
| **3.** | Street 1 | Mandatory |
| **4.** | Street 2 |  |
| **5.** | Street 3 |  |
| **6.** | City |  |
| **7.** | State/Province |  |
| **8.** | ZIP/Postal Code |  |
| **9.** | Country/Region |  |
| **10.** | Main Phone |  |
| **11.** | Fax |  |
| **12.** | Phone 2 |  |
| **13.** | Address Contact |  |

#### Competitors

The competitors will be defined in the system in a specific entity. The following attributes will be defined:

|  |  |  |
| --- | --- | --- |
| **Ref** | **Attribute Name** | **Description** |
| **1.** | Name | Mandatory |
| **2.** | Web Site |  |
| **3.** | Key Product |  |
| **4.** | Reported Revenue |  |
| **5.** | Address | Contains all address information fields |
| **6.** | Overview |  |
| **7.** | Strength |  |
| **8.** | Weakness |  |
| **9.** | Opportunity |  |
| **10.** | Threat |  |

Connect competitors to influencers / any account type

### Contact Management

The Contact entity will contain the following attribute fields:

|  |  |  |
| --- | --- | --- |
| **Ref** | **Attribute Name** | **Description** |
| **1.** | Salutation |  |
| **2.** | First Name |  |
| **3.** | Last Name | Mandatory |
| **4.** | Middle Name |  |
| **5.** | Job Title |  |
| **6.** | Business Phone |  |
| **7.** | Home Phone |  |
| **8.** | Mobile Phone |  |
| **9.** | Fax |  |
| **10.** | Email |  |
| **11.** | Parent Account | Lookup to Account entity |
| **12.** | Description |  |
| **13.** | Department |  |
| **14.** | Role | Mandatory Possible Options:   * Decision Maker * Influencer * Employee * Insider |
|  | Position (towards COS) | Possible Options:  Positive  Negative |
| **15.** | Manager |  |
| **16.** | Manager Phone |  |
| **17.** | Assistant |  |
| **18.** | Assistant Phone |  |
| **19.** | Gender |  |
| **20.** | Birthday |  |
| **21.** | Marital Status |  |
| **22.** | Anniversary |  |
| **23.** | Spouse/Partner Name |  |
|  | Kids/Kids Name |  |
|  | Kids age / birthdays |  |
|  | Hobbies |  |
| **24.** | Owner | Lookup to User entity |
| **25.** | Contact Method Preferences | Marks the channels of communication that a customer prefers |
| **26.** | Originating Lead | Lookup to Lead entity  Shows if the Account record was promoted from a Lead |
| **27.** | Last Date Included in Campaign | The last date that the Account was included in a marketing campaign |
| **28.** | Send Marketing Materials | Indicates whether the customer wants to receive marketing materials |

-relationship type with other accounts / contacts (e.g. a contact can be a decision maker for account 1 – a client and an influencers for account 2 – a prospect)

### Building and Tenant Management

A custom entity will be defined in the system to store Building information. The following attributes will be defined:

|  |  |  |
| --- | --- | --- |
| **Ref** | **Attribute Name** | **Description** |
| **1.** | Name | Mandatory; |
|  | Category | Possible options:  Office  Hospitality  Hospitals  Retail |
| **2.** | Description |  |
| **3.** | Development Stage (Office) | Possible options:   * Announced * In construction with pre-lease * In construction without pre-lease * Completed & vacant * Completed & leased |
| **4.** | Construction Year |  |
| **5.** | Class (Office) | Possible options:   * A * B * B+ * C (Villas, etc.) |
| **6.** | Address |  |
| **7.** | City |  |
| **8.** | Square Meters (Office, Retail) |  |
|  | No. of Rooms (Hospitality) |  |
|  | No. of Beds (Hospitals) |  |
|  | No. of Stars (Hospitality) |  |

Other categories: Hospitality, Hospitals, Retail Management

Information regarding building developer, constructor and so on will be defined using the Connections functionality described in the Account Management section.

Another custom entity will be defined to store building tenants information. Essentially, this entity will link the Account and Building entities to provide information on the buildings in which each client has offices, along with other information such as contract expiry date. The Tenant entity will include the following attributes:

|  |  |  |
| --- | --- | --- |
| **Ref** | **Attribute Name** | **Description** |
| **2.** | Account | Lookup to Account entity |
| **3.** | Building | Lookup to Building entity |
|  | Square meters |  |
|  | No. of workstations |  |
| **4.** | Observations |  |
| **5.** | Current Supplier | Lookup to Competitor entity |
| **6.** | Contract Expiration Date |  |

### Project and Product Types Management

The products and services offered by CORPORATE OFFICE SOLUTIONS were organized into 7 categories by project types:

1. Architectural design
2. M&E design
3. Fit out works
4. M&E works
5. Flooring
6. Furniture
7. Logistic services
8. Miscellaneous

Each Project Type category will contain one or more sub-categories of types of products and services specific to that project type:

|  |  |
| --- | --- |
| **Project Type** | **Type of Product / Service** |
| **1.Architectural Design** | 1.1 Architectural Design |
| **2.M&E Design** | 2.1 M&E Design |
| **3.Fit Out Works** | 3.1 ABCD Partitions  3.2 Other Glass Partitions  3.3 Plasterboard Partitions  3.4 Mobile walls  3.5 Ceiling  3.6 Technical Flooring  3.7 Other Fit Out Works |
| **4.M&E Works** | 4.1 Mechanical Works (HVAC, sanitary)  4.2 Strong currents  4.3 Low voltage |
| **5.Flooring** | 5.1 INTERFACE Carpet  5.2 TECSOM Carpet  5.3 TARKETT Vinyl  5.4 Other Flooring Finish |
| **6.Furniture** | 6.1 Steelcase  6.2 Sinetica  6.3 Narbutas  6.4 Mikomax  6.5 Sokoa  6.6 Nowy Styl  6.7 Executive furniture (BOS 1964, Ora Acciaio)  6.7 Other Furniture |
| **7.Logistic Services** | 7.1 Logistic Services |
| **8.Miscellaneous** | 8.1 Miscellaneous |

The project types will be defined in the CRM system as records in the Project Type entity.

The types of products and services will be defined in the CRM Product entity. The association between the Products and the Project Types will be maintained using the Project Type Item entity.

These will be used in opportunity and order records to identify the categories of products and services offered to customers.

**NOTE**

The CRM product catalog will not contain the actual lists of products and services offered by CORPORATE OFFICE SOLUTIONS, but rather the categories of products and services grouped by project types, as defined above.

## Sales Force Automation

### Opportunity and Sales Process Management

The CORPORATE OFFICE SOLUTIONS sales process pipeline will be focused around the CRM Opportunity entity. Each business opportunity with either an existing client or a new prospect will be registered in this entity, and its information will be continually updated as the sales process advances through the different stages of the pipeline.

The opportunity records will be created and maintained by the Sales Representatives. Each record will have one Sales Representative as its owner, set by default to the Sales Representative that created the opportunity record. Record owners can also be changed using the standard CRM Assign functionality. It is the opportunity owner’s responsibility to update the information as the sales process advances and to eventually close the opportunity as either won or lost, along with detailed information on the reason of the closing status.

**NOTE**

Each opportunity record will be related to a single Account record (client or prospect) and to a single Project Type record. This means that if for a certain client there is a business opportunity for more than one project type, an opportunity record will have to be created separately for each project type.

The following information will be recorded in an opportunity record:

|  |  |  |  |
| --- | --- | --- | --- |
| **Ref** | | **Attribute Name** | **Description** |
| **1.** | | Topic | Mandatory |
| **2.** | | Potential Customer | Lookup to Account entity  Mandatory |
| **3.** | | Revenue | Will be updated upon closing the opportunity as Won |
| **4.** | | Close Date | Will be updated upon closing the opportunity as either won or lost |
| **5.** | | Probability | Probability of closing the deal as successful |
|  | | Threats | descriere |
| **7.** | | Category | Mandatory Possible Options:   * Office (implicit) * Hospitality * Healthcare * Retail * Education |
| **8.** | | Pipeline Phase | Possible Options:   * 1. Introduction (implicit) * 2. Qualify * 3. Offer * 4. Negotiation * 5. Closing |
| **9.** | | Source | Possible Options:   * Existing Client * Networking * External Agent * Architect * Supplier |
| **10.** | | Building | Lookup to Building entity |
| **11.** | | Description |  |
| **12.** | | Project Type | Lookup to Project Type entity  Mandatory |
| **13.** | | Owner | Lookup to User entity  Mandatory |
| **14.** | | Source Campaign | Lookup to Campaign entity  Shows if the opportunity record was created as a result of a marketing campaign |
| **15.** | | Originating Lead | Lookup to Lead entity  Shows if the opportunity record was promoted from a Lead record |
| **18.** | | Square Meters |  |
| **19.** | | No. of Workstations/ Beds / Rooms | Show / hidden based on selected Category (7) |
| **20.** | | Currency | Lookup to Currency entity |

#### Closing Opportunities

An opportunity can be closed either as Won or Lost. When closing an opportunity, the following information must be updated: Closing Date (automatically set to the current date, but can be changed manually), Revenue, Description, Status Reason (Canceled or Out-Sold for Lost opportunities), Competitor (in case an opportunity was lost to a competitor). This information is stored in an Opportunity Close record, which is a type of Activity in the CRM system. An opportunity can be closed and reopened several times, and all this information can be viewed using the Closed Activities link in the Navigation Pane on the opportunity record form.

When closing an opportunity as Lost, the Sales Representative must also upload the last client offer in SharePoint from the closed opportunity record to serve as a reference for future interactions with the customer.

#### Opportunity Competition

Opportunity records can be linked to Competitor records to track competition on a certain business deal. This can be accomplished using the Competitors link in the Navigation Pane of the opportunity record form.

#### Opportunity Products

Product records defined in the Product Catalog can be added to Opportunity records using the Opportunity Product entity. Once an opportunity has been created, only Product records related to the opportunity’s Project Type can be added. An opportunity record without a specified Project Type cannot be linked to any Product record.

For Steelcase and Interface related Opportunity Products, a custom text field called Range will be defined.

### Orders

Once an opportunity has been closed as Won by a Sales Representative, a system workflow will be configured to automatically create an Order record related to the Opportunity. The same workflow will also notify the Sales Support department that a new Order was created via an email or CRM Task record.

The information contained in the Order records will be maintained by the Sales Support Department. This information includes the following:

|  |  |  |
| --- | --- | --- |
| **Ref** | **Attribute Name** | **Description** |
| **1.** | Name | Mandatory |
| **2.** | Order ID | System attribute, maintained automatically |
| **3.** | Customer | Lookup to Account entity |
| **4.** | Description | [no wk, etc.] |
| **5.** | Project Type | Lookup to Project Type entity  Mandatory |
| **6.** | COS Group | Possible Options:   * COS * COS AG * OIS |
| **7.** | Net Sales Volume |  |
| **8.** | Cost |  |
| **9.** | Profit Amount | Calculated automatically from Net Sales Volume and Cost fields |
| **10.** | Profit Percentage | Calculated automatically from Net Sales Volume and Cost fields |
| **11.** | Payment Term |  |
| **12.** | Contract Number | Manually maintained  Uses following format:  Year that the related Account record became client / client number / order number |
| **13.** | Order Date |  |
| **14.** | Owner | Lookup to User entity |
| **15.** | Opportunity | Lookup to Opportunity entity |
| **16.** | Source Campaign | Lookup to Campaign entity  Shows if the order record was created as a result of a marketing campaign – inherited from related opportunity record, if applicable |
| **17.** | Billing Address attributes | All Address entity attributes that correspond to the Billing Address |
| **18.** | Shipping Address attributes | All Address entity attributes that correspond to the Shipping Address |
| **19.** | Currency | Lookup to Currency entity |

**NOTE**

Each Order record will contain references to a single Opportunity, Customer, Project Type and Cos Group value at a time.

Typically, Order records will not be created manually but rather through the custom system workflow that triggers when an Opportunity is closed as Won. As a result, many of the Order record attributes will be automatically populated with the same values as the parent Opportunity record. These fields include: Name, Customer, Project Type, Net Sales Volume, Order Date, Opportunity.

The following information must be entered manually by a Sales Support user on each order record: COS Group, Cost, Payment Term, Contract Number, Billing Address, Shipping Address. The address information can either be retrieved automatically from the related Customer’s Address records by using the Lookup Address functionality (Order form ribbon menu), or entered manually.

In addition to the attribute fields, the Sales Support user must also manually retrieve the Products associated with the order from the parent Opportunity. This can be easily achieved using the standard Get Products functionality present on the Order form ribbon menu. Also, the Client Order document must be uploaded in SharePoint using the Documents section from the Order form Navigation Pane.

Upon completion, when all the necessary information is in place, the Order can be closed as Fulfilled or Canceled. A custom dialog will be developed to allow an order to be reopened in case of an error, so that the information contained can be modified.

### Target and Goals

Sales targets defined by CORPORTATE OFFICE SOLUTIONS will be implemented using the standard Dynamics CRM Goal functionality.

Dynamics CRM comes with powerful goal management capabilities which can be utilized to set various types of targets, monitor progress against them and hence have better control over the business.

The following Goal types will be defined and tracked in the system: Sales Revenue, Profit % and Number of new clients.

#### Goal Structure

The Goals will be defined yearly and monthly at organization level (with the value for each month being the yearly value divided by 12), and yearly for each Sales Representative (the value for each Sales Rep will be assigned manually with the sum of all Sales Rep target values being equal to the yearly organization value):

|  |  |  |  |
| --- | --- | --- | --- |
| **Ref** | **Goal** | **Period** | **Scope** |
| **1.** | Yearly Company Sales Revenue | Yearly | Organization |
| **2.** | Yearly Company Profit % | Yearly | Organization |
| **3.** | Yearly Company New Client No. | Yearly | Organization |
| **4.** | Monthly Company Sales Revenue | Monthly | Organization |
| **5.** | Monthly Company Profit % | Monthly | Organization |
| **6.** | Monthly Company New Client No. | Monthly | Organization |
| **7.** | Yearly Sales Rep Revenue | Yearly | Sales Representative |
| **8.** | Yearly Sales Rep Profit % | Yearly | Sales Representative |
| **9.** | Yearly Sales Rep New Client No. | Yearly | Sales Representative |

The Goal records will be defined at the start of each year by the System Administrator.

Goal’s achievement will be measured by using the standard CRM ribbon button, “Recalculate”.

## Marketing Automation

### Campaign and Marketing Lists Management

The CORPORATE OFFICE SOLUTIONS Dynamics CRM Online implementation will employ the out of the box marketing automation functionality. This includes campaign management functionality (campaign planning, automatic distribution of campaign activities, tracking of campaign responses) and marketing list management (creation of marketing lists by segmenting clients or prospects using different criteria, assigning marketing lists to campaigns).

There are two types of campaigns you can run using Microsoft Dynamics CRM: marketing campaigns and quick campaigns. Marketing campaigns represent marketing efforts over a period of time, while quick campaigns represent an instant marketing effort.

Marketing campaigns are used for traditional marketing efforts where the user may want to schedule multiple activities, such as an e-mail broadcast followed by targeted phone calls. These are longer term efforts, usually distributing information through several types of activities. Marketing campaigns also allow you to add target products, sales literature, and related campaign details to the campaign.

Quick campaigns are used for single-activity campaigns and are created using a wizard. These are shorter term efforts, distributing only one activity

Both types of campaigns allow users to:

* Create specific campaigns for distinct products/brands, sectors and / or business areas or purposes.
* Create campaign activities, which are the interactions with the customer, such as sending personalized e-mails, letters, or generating phone call activities.
* Use marketing lists, which are lists of customers that meet specific criteria, such as all customers who have bought a specific product in the last year. These lists can be either imported or exported in different formats (like for e.g. Excel or .csv)
* View campaign responses, which are the customer replies to campaign activities.

Marketing campaigns can have the following elements:

* Marketing list or Campaign segmentation: A list of specific customers that are being targeted in the campaign. Lists can be based on any information stored in the database.
* Campaign activities: The interaction with the customer, such as a letter, phone call, or e-mail generated automatically by the CRM for the selected audience (marketing list). Campaigns can have more than one activity.
* Planning tasks: Tasks that must be accomplished to launch and execute the campaign.
* Target products: Any products around which this campaign is centered, if it is about promoting specific products

When it is time to launch the campaign, the marketing coordinator will distribute the activities. Campaign activities can be created early in the campaign planning cycle and then planning tasks can be used as a reminder for when it is time to distribute them. Once a campaign activity has been distributed, the activity owner(s) will see these under Activities in their Workplace. They will then be responsible for performing the activity, such as making the phone calls or sending the e-mail.

The goal of any marketing campaign is to create measurable results. In Microsoft Dynamics CRM, these results are captured as campaign responses. The responses can be acted upon, by converting them to a lead or opportunity. Campaign responses can also be used to convert an existing lead to an account. Campaign responses can be captured in several ways:

* Record responses manually by creating a new campaign response.
* From within an activity, such as a phone call you received, convert the activity to a campaign response.
* Import responses, such as from an outsourced marketing campaign.
* In a campaign that uses e-mail via mail merge, customers can respond by e-mail and their messages are automatically converted to campaign responses.

All these actions recorded in the system, either automatically by CRM, and either manually by the user as response, planned or completed task means forming the campaign history.

The campaign records and marketing lists will be created and maintained in the CRM system by the Marketing Coordinator.

### MailChimp Integration

In addition to the CRM system, CORPORATE OFFICE SOLUTIONS currently uses MailChimp as a marketing tool to mass send emails and track responses to and from different marketing lists. This functionality will be manually integrated with the Dynamics CRM marketing campaign functionality at the following levels:

* Marketing lists defined in Dynamics CRM will be manually exported in Excel files and then imported into MailChimp
* Email responses and other tracking data will be manually exported from MailChimp and imported in CRM as campaign responses associated to campaigns defined in the system.

### Customer Surveys

PowerSurvey is a custom solution developed by a third party (PowerObjects) specifically for Microsoft Dynamics CRM that allows CRM users to define and send surveys to customers, receive responses, and link responses and survey-sent history back to the CRM records . The main advantage of the solution is that it is completely configurable from Dynamics CRM, requiring no other tools or technical knowledge to define, send and receive survey feedback from customers.

#### Creating and Sending Surveys

In order to create new surveys using the PowerSurvey solution, the following steps are required

1. Create survey questions
   * Define question text
   * Select the type of answer
   * Select required level
   * Depending on the question type, fill in additional fields

 

1. Build the survey
   * Name the survey
   * Depict a header, sub header, etc.
   * Select a banner
   * Specify questions per page, choose to have completed surveys emailed to up to 3 email addresses, and fill in a few other fields
   * Choose survey questions from the ones created

Once created, surveys can be sent by email to customers either individually, or in groups. The same Marketing List functionality used to segment customers by different criteria can be used here to send the right surveys to the right audience.

Survey Responses are automatically created in CRM every time a customer completes and submits a survey they received.

**NOTE**

The add-on costs $2 per user per month. Users counted are everyone enabled in the CRM system. It means that for an amount of 15 enabled users you will pay additionally 30$ (approximate 23 €) per month.

Surveys can be defined and sent by any user defined in the system, with the appropriate rights.

Some of the solution advantages are:

* It completely fits current requirements
* It is already implemented, tested and used by other organizations
* The surveys’ landing pages will be published on the PowerObjects dedicated site, which means that you are not supposed to expose one of your servers to the internet
* Is has a simple subscription functionality, integrated directly within CRM Online
* All survey responses are integrated in CRM, so you can:
  + See from client page which surveys filled-in
  + Create reports and analytics based on each question, survey, etc

## Reporting and Analytics

The following reports will be developed in the CRM system using standard Microsoft Reporting Services reports.

**NOTE**

Report layouts and definitions that were provided by CUSTOMER OFFICE SOLUTIONS are attached in this document. Final reports may not use the exact same layout but will contain the required information.

### Management Reports

#### Annual Sales Analysis

This report will use as a main data source the information recorded in CRM Order records.

Report Template:



#### Overall and Individual MPR

These reports will use as a main data source the information recorded in CRM Opportunity records.

When an opportunity is closed, the system will automatically fill in the Probability field:

100% - Won

0% - Lost

Individual MPR: All columns will be the same as for the first 3 months timeframe.

Reports Template:





#### Interface and Steelcase Projects Report

These reports will use as a main data source the information recorded in CRM Opportunity and Opportunity Product records, filtered only to those specific suppliers.

Report Template:



#### Won and Lost Project Analysis

This report will use as main data source information recorded in CRM Opportunity and Opportunity Close records.

Report Template:



#### Sales Dispatch

A custom entity will be created to store historic and aggregated sales information that will serve as a data source for this report. Sales information prior to January 1st, 2012 will be imported in the system, and future sales information will be automatically aggregated in this entity through a custom process described later in the document.

The Sales Aggregation entity will include the following fields:

|  |  |  |
| --- | --- | --- |
| **Ref** | **Attribute Name** | **Description** |
| **1.** | Year | Mandatory |
| **2.** | Client | Lookup to Account entity  Mandatory |
| **3.** | Value | Mandatory |
| **4.** | Type of Purchase |  |

Report Template:



**NOTE**

The Owner column in the report will contain the current CRM user that is the owner of the Account record.

### Sales Support Reports

The sales support reports will use as a main data source the information recorded in CRM Order records.

**NOTE**

Charts included in the report templates can also be implemented in the system using the standard Charts and Dashboard functionality described next.

Si pentru top 3 deals of the month & new clients of the month? De ex, pt top 3 deals of the month, trebuie aggregate comenzile aceluiasi cont.

Report templates:



### Charts

Charts and Dashboards provide users a higher level perspective of their business data. One or more charts can be defined and associated with an entity. Those charts become available to the user under the view tab and appear alongside a grid of entity data. Users then get an in-context visual representation of the grid data. Microsoft Dynamics CRM 2011 provides a built-in Chart designer that allows users to build all the common charts in the grid area.

Charts support multiple levels of drill down allowing users to drill down into the different segments of data. As the user drills down the view shown in the grid is updated and they can also select different chart types that are appropriate for the lower level of data.

New chart visualizations can be easily created by end-users. A Chart Wizard is available to help users customize and select the type of chart to display.

### Dashboards

Dashboards provide a simple way for users to see a variety of views of data from an application in a single place. Typically the view saves the user time from going to several different places to see key metrics. Dashboards can contain data from several different entities, showing saved charts, views and web resources all in one screen.

Dashboards can either be system dashboards where all users see them or user specific dashboards where they are tailored by a user to their particular need. Each dashboard can contain displays from a variety of sources and still be shown together in a single user view. In addition, the dashboard items can bring their native functionality with them; charts still have drilldown ability and grids can still be sorted or searched.

The following information will be available in the system through Dashboards and Charts:

* Sales Pipeline
* Scheduled activities
* Top Opportunities
* Top Customers
* Sales Performance
* Sales Target vs. Actual

## Custom Automated Processes and Workflows

The following custom automated processes and workflows will be developed for the CRM system in order to improve productivity and the flow of information:

|  |  |
| --- | --- |
| **Event** | **Action** |
| Opportunity was closed as Won or Lost | Check if Opportunity was related to a Building record and send a notification to the Account owner that the address may have changed |
| Opportunity was closed as Won | Create an Order record related to the Opportunity |
| Opportunity was closed as Won | Send a notification (email or CRM task) to Sales Support that a new Order has been created |
| Contract information from Tenant entity will expire in 1 year / 6 months | Send a notification to the Account owner |
| Order was created | Check if related Account record is a new client and set Account Number and Year Became Client information if necessary |
| Order was closed as Fulfilled | Printr-un view utilizatorii tip Sales si Sales Support sunt notificati ca informatiile sunt incomplete, atunci cand nu este completat campul de COST |
| Order Net Sales Value updated | Update aggregated sales information in the Sales Aggregation entity for the related customer and year |

## File Attachments

In order to minimize the disk space usage of the Dynamics CRM Online implementation, the file attachments related to accounts, orders and opportunity records will be maintained using an On Premise implementation of Microsoft SharePoint Foundation 2010 on one of CUSTOMER OFFICE SOLUTIONS’ servers. The SharePoint Foundation 2010 instance will be integrated with the Dynamics CRM Online implementation using the native integration functionalities of the two products.

The integration of Microsoft Dynamics CRM with Microsoft SharePoint Foundation enables CRM users to use document management capabilities (Document metadata, Versions control) and also search within the SharePoint site.

The SharePoint integration provides not only the ability to attach documents to CRM entities but also to change/edit these later on and keep the versions history.

**NOTE**

To use this out of the box integration between Dynamics CRM and SharePoint we need to use the existing available server. Still, some upgrades are required:

* Harddisk upgrade (existing storage is 70 GB)
* RAM upgrade (existing RAM is 3 GB, we recommend 8)
* Windows Server 2008 Standard edition
* SQL 2005 SP3 64 bit (if the existing SQL2005 server is 64 bits than we need only to apply the SP3 hotfix)

We can also use SQL Server 2008 Express Edition, which is free, but its’ databases have a limitation of 10 GB. It means that in few years, the SharePoint database might reach the 10 GB limit. So, you can start with the free edition, but please, take this limitation into consideration.

# Microsoft Dynamics CRM Online Non-Functional Requirements

The following requirements are applicable to the entire solution.

## System Access and Security

Microsoft Dynamics CRM uses a combination of role-based security and object-based security to determine what users can see and do within the application. Each user is assigned a business unit and either one or more security roles. The application supports the ability to create security roles based on the requirements set forth by the business. All application security is managed within Microsoft Dynamics CRM.

### Security Roles

The following security roles will be defined in Dynamics CRM: **Sales Representative, Marketing Coordinator, Sales Support** and **General Manager**.

The following table summarizes the level of privileges for each major entity/functionality assigned to each security role:

| **Entity/Role** | **Sales Rep.** | **Marketing Coord.** | **Sales Supp.** | **Gen. Manager** |
| --- | --- | --- | --- | --- |
| **Account** | Full on own accounts, read only on others | Full on own accounts, read only on others | Full | Full |
| **Contact** | Full on own contacts, read only on others | Full | Full | Full |
| **Opportunity** | Full on own opp., read only on others; cannot create opp. on accounts that are not owned | Read Only | Read Only | Full |
| **Order** | Full on own orders, read only on others; cannot create orders on accounts that are not owned | Read Only | Full | Full |
| **Building** | Full | Full | Full | Full |
| **Tenant** | Full | Full | Full | Full |
| **Lead** | None | Full | Full | Full |
| **Goals** | Read Only | Read Only | None | Full |
| **Activity Records** | Full on own records, none on others | Full | Full on own records, none on others | Full |
| **Competitors** | Full | Full | Full | Full |
| **Marketing Campaign** | Read Only | Full | Full | Full |
| **Marketing Lists** | Read Only | Full | Full | Full |
| **Export to Excel** | No | Yes | Yes | Yes |

#### System Administrator Role

The standard CRM System Administrator Role has full privileges over every system functionality, including customization and system administration privileges. The System Administrator role will be assigned to a single person in the organization that will be in charge of all administrative tasks, such as creating or inactivating users, assigning security roles, data import and maintaining organization level entity records ( Project Types, Products, Territories, Goals and others).

### Reports Access

All CRM users will have access to all the reports defined in the system. Based on each user’s assigned security role, when running a report only the information to which he/she has access will be displayed.

### Data Auditing

Microsoft Dynamics CRM supports an auditing capability where entity and attribute data changes within an organization can be recorded over time for use in analysis and reporting purposes. Auditing is supported on all custom and most customizable entities and attributes.

**NOTE**

Auditing is not supported on metadata changes, retrieve operations, export operations, or during authentication

Data auditing is not enabled by default and can be customized to include only a select group of attributes from different entities. Because it can have a negative impact on overall system performance, it is important to only enable data auditing on attributes that contain sensible data or that can provide additional information by studying changes over time (for example the Job Title attribute of the contact entity can show the professional progress of a certain contact).

The following table contains a suggested list of attributes to be audited:

|  |  |
| --- | --- |
| **Entity** | **Attribute** |
| **Opportunity** | Revenue |
| **Account** | Address information |
| **Contact** | Name |
|  | Job Title |
|  | Parent Account |
| **Order** | Profit |
|  |  |

# Data Migration

Legacy data must be migrated from the existing CRM system and other data sources. The CORPORATE OFFICE SOLUTIONS project team must supply the required data for import in Excel files with the structure and information specified in this document for each CRM entity.

## Global Data

The global data that will be imported in the CRM system includes:

* Accounts
* Contacts
* Buildings
* Tenants

## Sales Data

Active Opportunity and Order records created during the current year will either be manually created in the system or imported from manually created Excel files. The Client Orders and other documents will also be uploaded manually in CRM using the SharePoint Document Management functionality.

For historic reports, such as Sales Dispatch, the already aggregated historic information from before January 1st, 2012 will be imported in the Sales Aggregation custom entity.

Sales target data from 2011 will also be imported in the system as pre-calculated Goal records in order to provide comparison to last year values in Sales Performance reports.

**NOTE**

Closed Opportunity and Order records created before January 1st, 2012 will not be imported in the system. This data will be available only in aggregated form.

Other record types referenced in this document and not specified in this section will be manually defined in the system.

**NOTE**

The CORPORTATE OFFICE SOLUTIONS project team must supply all data required for import in a correct and consistent form in the time frame agreed in the project timeline. The MATRICIA SOLUTIONS team will provide support during the initial data import.

# Risk Management

This chapter lists the possible risks that may appear during the following system implementation phases. The CORPORATE OFFICE SOLUTIONS and MATRICIA project teams must analyze these factors and come up with solutions to minimize these risks and ensure the CRM system will be correctly implemented and used.

|  |  |  |  |
| --- | --- | --- | --- |
| **Ref** | **Risk** | **Risk Mitigation** | **Impact** |
|  | Sales support responsibility distributed throughout the Sales Support Department with only one CRM user license available | Assigning the responsibility to a single **designated** person in the department or acquiring more CRM user licenses | Major |
|  | Continually maintaining the accounts, addresses, contacts, buildings and tenants database with up to date information | Assigning the responsibility to a single **designated** person in the organization (CRM officer) | Major |
|  | Initial import data consistency | Matricia team will provide the import layouts as soon as possible with sample data within. COS team will plan in due time tasks for data preparation and allocate people responsible. | Medium |
|  | Low end user system adoption and utilization during initial roll-out | Executive sponsorship strong enough to drive users to use the solution; Internal communication plan | Medium |