**Functional Requirements Document**

Microsoft Dynamics CRM Implementation



**ENSIGHT**

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| --- | --- |
| Author | Ana Maria Ignat |
| Author Role | Project Manager |
| Date | 16/05/2013 |

Prepared for

Project

Prepared by

**[Ana Maria Ignat]**

Contributors

**[Document contributors]**

**Revision and Signoff Sheet**

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**Approvers**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Version approved** | **Position** | **Date** |
| Ileana Ionescu, Flavia Matei |  | Sales – Business Decision Maker |  |
| Simona Wist |  | Marketing – Business Decision Maker |  |
| Harald Ditter |  | Partner |  |

**Approvers**

|  |  |
| --- | --- |
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Introduction

This document provides the functional/business requirements of ENSIGHT’s Customer Relationship Management Solution.

## Target Audience

The document is aimed at ENSIGHT’s management, particularly sales management and managers of sales-related areas.

## Purpose

This document details the business needs of the envisioned solution. The purpose of the Functional Requirements Document can be summarized as follows:

* It identifies and documents ENSIGHT’s requirements;
* It forms the basis of the Functional Design Document (FDD) and system configuration;
* It forms the basis of planning;
* It forms the basis of quality assurance; and
* It forms the basis of functional tests.

## Definitions, acronyms and abbreviations

|  |  |
| --- | --- |
| *Acronyms* | |
| FRD | Functional Requirements Document |
| ROI | Return on investment |

## Scope of Solution

The implementation will focus primarily on core sales and marketing automation and relationship-management functions.

### In Scope

The subsequent activities are considered to be included:

* Business processes
  + Lead-to-account and contact conversion
  + Opportunity processes for product sale opportunities
  + Opportunity processes for construction projects
  + Opportunity processes for sample requests (replacing current Web Request Form)
  + Quick Campaigns and direct e-mail for corporate communications
* Initial Setup
  + Analysis of business flows and deliverable of FRD.
  + Setup of the system
    - Customization of entities: Account, Contact, Lead, Activity, Opportunity, Quote (shall be renamed as Proposal), Project
    - Creation of forms and views together with the administrator from ENSIGHT team, during the design phase of the project.
    - Installation of Language Packs
* Training
  + Assist with the development of training outline – training will be based on user manuals written in English, for specific ENSIGHT flows.
  + Provide 1 day training for sales key-user and end-users before the testing phase begins
  + Provide 1 day training for marketing key-user and end-users before the testing phase begins
  + Provide ½ day of CRM administrative training with resources identified as Microsoft Dynamics system administrators.
  + Provide ½ day training with resources identified as Microsoft Dynamics system administrators for creation of standard reports: views, charts.
* Reports
  + Development of six company specific reports, based on data available from the system, see section *3.8 Reporting and* Analytics
* Migration
  + Import data into CRM, manually, based on file formats supplied by MATRICIA.

### Out of Scope

The subsequent activities are considered not to be included in the project:

* Complex development including automations like plug-ins or workflows
* Preparation/formatting, data cleansing, de-duplication and export of legacy data for the migration
* Validating migrated data by MATRICIA
* Automatic integration between CRM and the company ERP, NAV.
* End-user and key-user training beyond that identified in the previous “In Scope” list

Microsoft Dynamics CRM General System-Wide Requirements

## Performance

**Requirement Statement:** The CRM Solution should provide acceptable end-user and server-side performance. Lack of performance could impede solution adoption.

**Explanation:** The Microsoft Dynamics CRM application utilizes the latest in Web and server technologies.

## Upgradability and Customizations

Requirement Statement: The solution must conform to Microsoft Dynamics CRM best practices to help ensure version upgrades are compliant.

Explanation: The Microsoft Dynamics CRM application is an incredibly flexible and open system. Customizations/Personalization fall into the following categories.

|  |  |  |
| --- | --- | --- |
| Customization/Personalization | Description | Upgradeability/Supportability |
| Entity customization and creation | The personalization of entities such as adding new fields and views. | Supported |
| Custom Reports | The use of SQL Server Reporting Services to modify the default reports or create new reports. | Supported |
| Client-side customizations | The use of jscript on the entity forms to invoke business-logic behavior. | Supported |
| Server-side integration | The use of the Dynamics CRM SDK to build server-side logic. | Supported |
| Plug-Ins | Pre and Post callouts allow for the creation of custom business logic with Microsoft .NET assemblies that can link directly to the application logic. | Supported |
| Site map and ISV configuration | The user interface and application can be modified by modifying these two files. | Supported |
| Application File changes | Modifying any of the .aspx or .jsfiles. Installing or adding files to the Microsoft CRM folders. | Unsupported |
| Modifying DLLs | Referencing of decompiling any of the Dynamics CRM.DLL files. | Unsupported |

## System Access and Security

**Requirement Statement:** The solution must utilize a directory service similar to Microsoft Active Directory.

**Explanation:** Microsoft Dynamics CRM user authentication is based on domain account. However, the administration of user-level access is performed at the application. 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. However, there is no correlation between the active directory network security structure and the Dynamics CRM application security. All application security is managed within CRM.

## User Interface and Application Access

**Requirement Statement:** The solution must be accessible via a Web browser as well as integrated with Microsoft Office Outlook.

**Explanation:** Microsoft Dynamics CRM is a browser-based application. Additionally, the Dynamics CRM Client for Microsoft Outlook is available to users.

## Data Conversion

**Requirement Statement:** Microsoft Dynamics CRM must have the ability to import accounts, leads, contacts and opportunities.

**Explanation:** This functionality can be achieved through the Data Import Manager.

## Organizational Structures

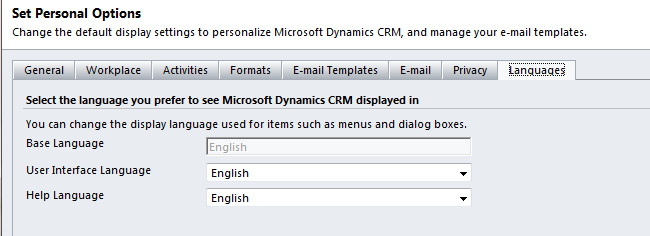
**Requirement Statement:** The envisioned application must be able to support ENSIGHT’s hierarchical organization structure including Senior Consultants, Managers, Principals and Partners.

**Explanation:** Microsoft Dynamics CRM has the concept of Business Units, which supports the required hierarchical structure. Business Units is a way of representing a division or department in a company. Business units are arranged in a hierarchy, and all users are assigned to one business unit (known as Practice).

## Multi-Language Support

**Requirement Statement:** The solution must be able to support multiple languages, specifically English and Romanian.

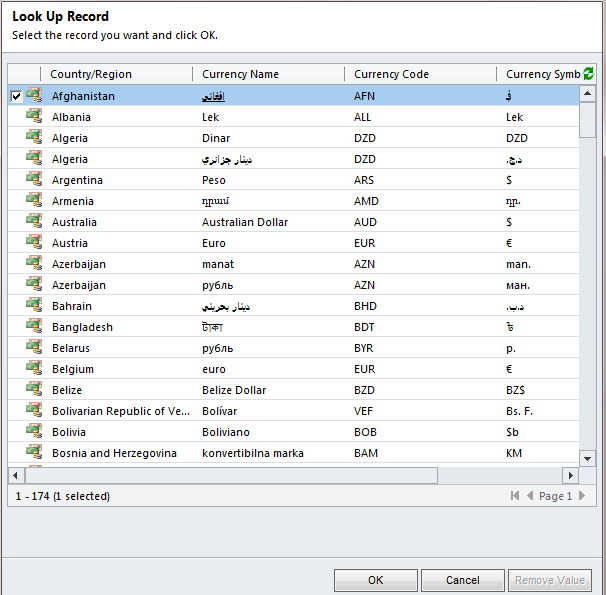
**Explanation:** Microsoft Dynamics CRM supports multiple languages and can be seen in the graphic below.



## Multi-Currency Support

**Requirement Statement:** The solution must be able to support multiple currencies.

**Explanation:** Microsoft Dynamics CRM offers multi-currency support for global-business transactions. The application includes a baseline currency defined for the organization and used for reporting, and a transactional currency that can be selected for individual transactions, as well as defined as a personal option by users. Transaction currency is based on an exchange rate of the baseline currency for the organization. Exchange rates are configured on the server as a snapshot. Pricelists are also configurable in multiple currencies. Microsoft Dynamics CRM also supports the creation of custom currencies.



ENSIGHT CRM Functional Requirements

The following tables outline the requirements specifically around the customer’s Sales-Force and Marketing Automation functionality.

## Account Management

| ID | Category | Requirement | **Must Have (M)/**  **Future (F)** | Requirements Workshop Comments |
| --- | --- | --- | --- | --- |
| 1 | Account Management | The solution application must be able to support the definition of prospects, clients, partners, suppliers and press. | M | The different types of accounts will be separated through the Relationship Type field.  Furthermore different views will be defined to view the data independently.  Particularities for this entity are:   * Account Number will be represented by the Fiscal Number * A field for company Registration Number will be defined * A field for the company Bank Account will be defined * The Annual Revenue field will be represented by a list of ranges * The Number of Employees field will be represented by a list of ranges |
| 2 | Account Management | The solution application must be able to support the definition of multiple addresses and address types: Billing, Delivery. | M | Microsoft Dynamics CRM supports this functionality. |
| 3 | Account Management | The solution application must be able to support a multi-relationship structure. | M | Microsoft Dynamics CRM supports the concept of an account/sub-account relationship. Sub-accounts can be assigned one parent account which allows the ability to roll-up sales activities at the overall parent level. A common scenario is when an organization has multiple locations where work is performed or when multiple accounts belong to an association or a group. Therefore if a company has multiple entities, represented by a different fiscal number, then each of them will represent a sub-account.  For the situation when the same account performs multiple functions, is also a client and a partner, then it will be registered into the system as his main function, let’s assume is client. Then the other functions will be defined through the functionality of connections, in order to avoid duplication of data. |
| 4 | Account Management | The solutions application must be able to allow the accounts to be uniquely identified through an account number. | M | The account number will be represented through fiscal number (CUI).  If the client has multiple entities then each of them will be identified by a different fiscal number.  In Reports data will be visible both at account or parent account level. |
| 5 | Account Management | The solutions application must be able to allow the assignment of accounts to a specific owner. | M | As the accounts will be initially created through import and then there will be only one person registering and maintaining account data, the account will have to be assigned to the corresponding user or employee without a user.  If the account is managed by an existing CRM user then it will be assigned to it, otherwise the person that manages the account will be selected in the ***Responsible*** field.  For the Responsible field all the ENSIGHT Employees will be registered in the system as contacts for the ENSIGHT account. |
| 6 | Account Management | The solutions application must be able to allow visibility over a list of invoices, unpaid invoices for an account or multiple accounts. | M | A custom report with data from NAV that could be accessible from CRM will be designed. |
|  |  |  |  |  |

## Contact Management

| ID | Category | Requirement | **Must Have (M)/**  **Future (F)** | Requirements Workshop Comments |
| --- | --- | --- | --- | --- |
| 7 | Contact Management | The solution application must be able to support the definition of multiple contacts for an account. | M | Microsoft Dynamics CRM supports this functionality. |

## Activity Management

| ID | Category | Requirement | **Must Have (M)/**  **Future (F)** | Requirements Workshop Comments |
| --- | --- | --- | --- | --- |
| 8 | Activity  Management | The solution application must be able to support the definition activities, like appointments, tasks, email, phone conversations. | M | “Out-of-the-box” functionality for tracking activities.  Some additional fields are required in order to track sales activities costs:   * **Expense Type**: Demo, Pre-sales activities, Accommodation Charges, Travel Expenses, Meal expenses, Event Participation * **Cost** – this field will be entered manually in case of travel, accommodation or event participation charges, based on the information from NAV. Otherwise will be filled in automatically based on the activity duration and the owner’s standard rate.   Generate multiple leads from the appointment created for event participation? |

## Lead, Opportunity, Sales Process Management

| ID | Category | Requirement | **Must Have (M)/**  **Future (F)** | Requirements Workshop Comments |
| --- | --- | --- | --- | --- |
| 9 | Sales Management | The solution application must be able to allow the definition of four sales stages:   * Lead * Opportunity * Proposal * Close | M | **The Lead stage will deal with the Lead entity from CRM**. This is an observation to be taken into account for later reporting.  **From the Opportunity stage the system will deal with the Opportunity entity from CRM**. This record can be closed in any of the stages as Won or Lost.  **In the Proposal Stage the system will allow the creation of Quotes in CRM** (the equivalent of financial proposals from ENSIGHT’s sale flow).  **In the Close stage if the opportunity is Won it will turn into a Project entity in CRM.**  In all of these stages activities performed by the user can be defined: Tasks, Appointments, Phone Calls, and Emails. In case the activity is not related to a certain lead, then it can be related to an account or project or something else that is relevant. |
| 10 | Lead Management | The solutions application must be able to allow the definition of leads. | M | A lead is represented by a company name or contact information, or both. At this point the sales process is in the **Lead Stage**.  A part from the standard fields the following fields will also be defined:   * **Responsible** = Name of an ENSIGHT Employee, other or equal to the owner of the lead * **Estimated Qualify Date** = This will be a mandatory field than should be set manually by the user. An additional validation for it will be that the set date should not exceed the two months period. If the lead is not closed by that time the system will provide a view with all neglected leads. * **Probability of closing** (this field will be available on all stages) **=** List of predefined values that correspond to a percentage that will be applied to the estimated budget.   + Active Lead – 0 %   + Good Prospect – 35 %   + Hot Prospect – 65 %   + Booked Revenue – 95 %   + Complete – 100 %   So if the overall estimated budget is 1000 EUR and the POC = Good Prospect then 350 EUR should be considered as a revenue for the estimated close date and should be visible in the pipeline.  This field will be set manually by selecting from a list of predefined values. When the field is selected another one will be filled in automatically by the system with the steps that should have been performed for selected option.   * **Annual Revenue** – should be a list of predefined values with ranges. * **Number of Employees** – should be a list of predefined values with ranges. * **Purchase Process** – should be a list of predefined values like: Public, Private |
| 11 | Lead Management | The solution application must be able to allow tracking of qualified versus disqualified leads. | M | **A list of reasons for disqualifying the lead will be supplied by ENSIGHT.**  Once the lead is qualified the sales process will move from the **Lead Stage** to the **Opportunity** **Stage** and an opportunity, an account and a contact will be created in the system.  If a new lead for the same account will be later on created into the system, when the lead is qualified the system will issue a warning for the duplicate account and will not create a duplicate. The lead will be associated with the already existing account.  If the lead is disqualified (because it is postponed or canceled for a period of time) it will remain deactivated in the system and later at any time there is an option to reactivate the lead and resume the activity from where it was left off.  The reason for disqualifying a lead will help differentiate the lost leads from the ones that got postponed or canceled.  In care a lead is reactivated the user should first check the history data in order to make sure that this lead does not already exist. |
| 12 | Lead Management | The solution application must be able to allow the assignment of leads to another user. | M | Assignment operations can be performed only between CRM users.  If the responsible, not the owner, has to be changed and changes have to be tracked then audit will be used for the responsible field. |
| 13 | Opportunity Management | The solutions application must be able to allow the definition of opportunities. | M | Some additional fields are required to be defined on the opportunity entity:   * **Opportunity Type**: Extension, Expansion, New, Cross – Sell, Direct Request - This fields will help track the opportunities that were identified from existing projects. This field will be mandatory. * **Project** – this field will be mandatory if Opportunity Type is different from New or Direct Request. * **Partnership** – Yes / No * **Partner Name** – a record from the account entity with Relationship Type = Partner * **Partner Value (money)** * **Client Partner –** name of an ENSIGHT partner in charge with the opportunity. * **Responsible** * **Practice** – list of predefined values: Strategy, Operations and HR, IT and Financial.   The Engagement Risk Assessment is no longer included in this project scope. The format of this file is presented in the picture below. The file, will be filled in by the user, outside CRM, and later on can be attached to the opportunity.    If the opportunity has a positive outcome and a proposal will be sent to the customer then the sales process will move from the **Opportunity Stage** to the **Proposal Stage**.  If the opportunity will not be pursued then it will be closed with a status of LOST. A list of loss reasons will be supplied by ENSIGHT. Also a loss review check will have to be specified in the Description field on the Win\Lost form |
| 14 | Quote Management | The solutions application must be able to allow the definition of quotes (proposals). | M | In order to define a quote a price list has to be defined. It was agreed that a standard price list with ENSIGHT’s standard services and rates will be defined.  If necessary a custom price list for each project can be defined and also a discount per quote. This will allow tracking of   * standard versus proposed rates for each service * evolution of service rates in time * average rate for a team member   Also in this stage the project team will be defined. This will be a custom entity, “**Project Team**” that will hold the following information:   * ENSIGHT Employee (Contacts) * Service provided in the project – selection from the list with standard services * Service Daily Rate * Job Title   The Proposal Content Checklist is no longer included in this project scope. The Proposal Content Checklist is presented in the picture below. This file will be filled in by the user, outside CRM, and can be later on attached to the opportunity, in order to create traceability.    Alterations to existing fields:   * Request Proposal – should be a date field * Sent Proposal – should be a date field   If the quote is agreed upon then the sales process will move from the **Proposal Stage** to the **Close Stage**. The opportunity will be closed with a status of WON and a project will be created.  Otherwise the opportunity will be closed with a status of LOST and a reason selected from a predefined list. |
| 15 | Quote Management | The solution application must be able to allow tracking of changes on the quote from the draft version to the approved version. | M | The system should display in a report the differences between the revisions of a quote:   * If there were services added or removed * If there were changes in price   + If the price changed because it was discounted then it should remain the same on all quotes and a discount should be added   + If the price changed because part of the services scope changed then the price should change all together, without discount |

## Project Management

| ID | Category | Requirement | **Must Have (M)/**  **Future (F)** | Requirements Workshop Comments |
| --- | --- | --- | --- | --- |
| 16 | Project Management | The solutions application must be able to allow the definition of projects. | M | The project entity must contain the following information:   * Project Name * Project Code * Project Manager * Client * Proposed Start Date * Proposed End Date * Actual Start Date * Actual End Date * Contract Number * Contract Date * Contract Value * Invoiced Value * Total man-days * Overall Rating – this will be a percentage from the Customer Satisfaction Survey * Level – This will be a list of predefined values: Excellent, Good, Medium, etc.   **All the information in this form will be filled in manually by the user.**  Also the fields from the Project Close-Out Checklist will be filled for the project. |

## Marketing Management

| ID | Category | Requirement | **Must Have (M)/**  **Future (F)** | Requirements Workshop Comments |
| --- | --- | --- | --- | --- |
| 17 | Marketing Management | The solutions application must be able to allow the definition of different segmentation criteria for targeted accounts, contacts and leads. | M | This is available through Marketing Lists. |
| 18 | Marketing Management | The solutions application must be able to allow the definition of marketing campaigns. | M | “Out-of-the-box” functionality. |
| 19 | Marketing Management | The solutions application must be able to allow the tracking of responses for the campaign. | M | This is available through Campaign Responses. The responses will be tracked manually by the users, after the follow-up call with the targeted account. |
| 20 | Marketing Management | The solutions application must be able to allow the tracking of budgeted versus actual campaign cost. | M | The campaign activities have an associated cost. As the activities are completed the cost is rolled-up at campaign level and compared against the estimated budget. |
| 21 | Marketing Management | The solutions application must be able to allow the tracking of campaign ROI. | M | This is done by converting the campaign responses into opportunity. The revenue generated by the opportunity will be tracked against the originating marketing campaign. |
| 22 | Marketing Management | The solutions application must be able to allow the definition of email and newsletter templates. | M |  |
| 23 | Marketing Management | The solutions application must be able to allow automatic tracking of leads from the company site. | F | At this point Microsoft Dynamics CRM provides a functionality that will allow a user to track any email into CRM and convert into an opportunity. The Email cannot be automatically converted into an account. Afterwards can be assigned to a certain user or responsible.  **The information from the CRM form will have to be filled in manually.** |
| 24 | Marketing Management | The solutions application must be able to allow the distribution of emails to over 2000 subscribers. | M | Microsoft Dynamics CRM allows email-s to be sent from an unlimited number of subscribers.  We shall test this functionality during the testing phase. |
| 25 | Marketing Management | The solution application must be able to allow statistics on opened emails and un-subscriptions. | F | Microsoft Dynamics CRM does not have this functionality in standard.  This could be achieved using Mail Chimp, for an additional cost. |
| 26 | Marketing Management | The solution application must be able to allow tracking on accessing links for social channels like Facebook, LinkedIn. | F | Microsoft Dynamics CRM does not have this functionality in standard.  This could be achieved using Mail Chimp, for an additional cost. |
| 27 | Marketing Management | The solution application must be able to allow integration with Microsoft Lync. | F | Microsoft Dynamics CRM does not have this functionality in standard. |
| 28 | Marketing Management | The solution application must be able to auto-update subscribers/unsubscribes in pre-defined marketing lists (integration between Mail chimp Lists and CRM Marketing Lists) | F | Microsoft Dynamics CRM does not have this functionality in standard.  This could be achieved using Mail Chimp, for an additional cost. These tools or not integrated by default but there are a list of third party suppliers for this integration. Please see the links below:   * <http://www.bizminers.com/eng/product/mailchimp-dynamics-crm-2011-integration-tool/> * http://www.powerobjects.com/add-on-subscriptions/powerpack/powermailchimp/ |
|  |  |  |  |  |

## System Administration

| ID | Category | Requirement | **Must Have (M)/**  **Future (F)** | Requirements Workshop Comments |
| --- | --- | --- | --- | --- |
| 30 | System Administration | System will allow management of user accounts, reference data, workflow assistance and facilities. | M | “Out-of-the-box” functionality. The system provides this functionalities without any supplementary customizations.  Workflow assistance refers to the fact that you can design custom alerts or validations. |
| 31 | System Administration | Add and deactivate users. | M | “Out-of-the-box” functionality. The system provides this functionalities without any supplementary customizations. |
| 32 | System Administration | Manage user permissions to read, write, delete and modify records and fields, and access the database remotely. | M | “Out-of-the-box” functionality. The system provides this functionalities without any supplementary customizations. |

## Reporting and Analytics

| ID | Category | Requirement | **Must Have (H)/**  **Future (F)** | Requirements Workshop Comments |
| --- | --- | --- | --- | --- |
| 33 | Reports | **Lead Analysis Report** should be available from the system. | M |  |
| 34 | Reports | **Responsible Breakdown Report** should be available from the system. | M |  |
| 35 | Reports | **Responsible Analysis Report** Should be available from the system. | M |  |
| 36 | Reports | **Dashboard Report – General Indicators** should be available from the system. | F | Not in this project scope. |
| 37 | Reports | **Dashboard Report – Sales Indicators** should be available from the system. | F | Not in this project scope. |
| 38 | Reports | **Dashboard Report – Sales Indicators**, **Values** should be available from the system. | F | Not in this project scope. |
| 39 | Reports | **Neglected Leads Report** should be available from the system. | M |  |
| 40 | Reports | **Invoicing List Report** should be available from the system. | M |  |

### Lead Analysis Report

Report Parameters

* Start Date
* End Date
* Industry
* Lead Source
* Responsible
* Client Partner
* Practice

Report Columns

* Account Name
* Number of identified leads – number of created leads between start and end date
* Number of disqualified leads
* Number of Open Opportunities (is equal to the number of qualified leads)
* Number of Won Opportunities, based on Close Date
* Number of Lost Opportunities, based on Closed Date
* Number of Sent Proposals(quotes), based on Sent Proposal field
* Proposed Value Net (Sum) from all created proposals between start and end date
* Discounted Value (Sum) from all created proposals between start and end date
* Contracted Value, from Projects
* Lead Created On – this is the actual creation of account date
* Total Activities – count of activities related to the account
* Number of Appointments from total activities
* Hit Rate Value = Contracted Value / Proposed Value Net
* Hit Rate Count = Number of Contracts / Number of Proposals

Report Layout = Table

### Responsible Breakdown Report

Report Parameters

* Start Date – End Date
* Industry
* Practice

Report Columns

* Responsible Name
* Number of Open Leads – current, it does not take into account the start and end date
* Number of Generated Leads – count of created leads between start and end date
* Number of Qualified Leads – count of qualified leads between start and end date
* Number of Disqualified Leads – count of disqualified leads between start and end date
* Number of Generated Proposals – count of created quotes between start and end date
* Number of Open Opportunities – current
* Number of Generated Opportunities – count of created opportunities between start and end date
* Number of Lost Opportunities – count of lost opportunities between start and end date
* Number of Generated Contracts – count of created projects between start and end date
* Proposed Net Value from quotes – sum of net value from all created quotes between start and end date
* Number of Activities – count of activities between start and end date

Report Layout = Table

### Responsible Analysis Report

Report Parameters

* Responsible

Report Columns

* MTD – Month To Date
* Previous Month
* YTD – Year to Date

Report indicators

* Number of activities – count of activities (appointments phone calls, tasks)
* Number of activities for existing customers – count of activities performed on already established accounts – as of today (for accounts where we already started a project, account on which at least one opportunity was won)
* Generated leads – count of created leads
* Qualified leads – count of qualified leads (identified opportunities)
* Average duration, in days, for qualifying a lead = sum of number of days from creation date of the lead to qualifying date of the lead split by the number of qualified leads
* Total Opportunities by Type = count of created opportunities by type (new, expansion, extension, cross-sell, direct request), there will be a line automatically generated for each opportunity type
* Average duration, in days, for creating a proposal = sum of number of days from created the opportunity until the creation of the proposal related to the opportunity, split by the number of created proposals.
* Sent Proposals = count of sent proposals, based on Sent Proposal field
* Probability of closing –Sum(Probability of closing \* total value) / Sum(total value) regarding the created proposals
* Contracts = count of created projects
* Total Proposals Value = Sum of Total Value
* Total Proposals Discount Value – Sum of Net Proposed Value
* Loss Review-– number of lost opportunities that have the Loss Review field filled in

Report layout 

### Dashboard Report – General Indicators

Report Parameters

* Start Date
* End Date
* Practice

Report Columns

* Selected Interval
* CYTD = Current Year To Date
* Weekly Average YTD

Report Indicators

* Status Changes = Count of sales stages changes, in the selected interval – can only be retrieved from audit
* Visits + Phone Calls = Count of total visits (appointment from CRM) and phone calls created in the selected interval
* Activities on existing clients = – count of activities performed on already established accounts – as of today (for accounts where we already started a project, account on which at least one opportunity was won)
* Event participation = count of all activities that have Expense Type = Event Participation
* Leads = Count of total created leads, in the selected interval
* Leads by source = Count of total created leads, by lead source; There will be a line automatically generated for each lead source

Report layout = Matrix



### Dashboard Report – Sales Indicators

Report Parameters

* Start Date
* End Date
* Practice

Report Columns

* Selected Interval
* Previous Interval – This column follows the next rules:
  + If the interval is less or equal to a month (30 days), then this column refers to the same period from the previous month
  + If the interval is greater than a month (30 days), then this column refers to the same interval, from the previous year
* YTD

|  |  |  |  |
| --- | --- | --- | --- |
| Start Date – End Date (Interval) | Selected Interval Column | Previous Interval Column | YTD |
| 10th May 2014 - 20th May 2014 | 10th May 2014 - 20th May 2014 | 10th April 2014 - 20th April 2014 | 1st January 2014 – Current Date |
| 10th May 2014 – 1st July 2014 | 10th May 2014 – 1st July 2014 | 10th May 2013 – 1st July 2013 | 1st January 2014 – Current Date |

Report Indicators

* Opportunities by Type = Count of numbers of opportunities created in the selected interval, by Opportunity Type (New, Expansion, etc.) A line will be generated automatically for each opportunity type.
* Lead To Opportunity
  + Percentage – Count of Qualified Leads in interval / (Count of created Leads in interval + Count of existing open leads at the beginning of the interval)
    - For example, let’s say we consider the interval between 15th of April and 15th of May. At the beginning of the interval there were 20 open leads in the system and we’ve managed to add 30 more, by the end of the interval. So, at the end, the count of total leads = 50. Within the interval we’ve managed to qualify 40 of the leads. Therefore the formula will show 40 / 50.
  + Duration = Average duration for qualifying a lead, in days
    - It will sum up all of the intervals between the creation date of the lead and the qualifying date of the lead and split it by the number of qualified leads.
* Opportunity to Proposal (Quote) – There will be a line for each Opportunity Type
  + Percentage = Count of created Proposals in interval / Count of open Opportunities in interval (existing + new)
  + Duration = average duration, in days, for creating a proposal, split by the number of proposals; The duration will be measured as the number of days between the creation of the opportunity and creation of the associated proposal
* Proposal to Contract (Project)
  + Percentage = Count of created Contracts in interval / Count of open proposals in the interval (existing + new)
  + Duration = average duration from the proposal creation to the closing of proposal, split by the number of projects

Report Layout



### Dashboard Report – Sales Indicators Values (money)

Report Parameters

* Start Date
* End Date
* Practice

Report Columns

* Selected Interval
* Previous Interval – This column follows the next rules
  + If the interval is less or equal to a month, then this column revers to the same period from the previous month
  + If the interval is greater than a month, then this column refers to the same interval, from the previous year
* YTD

Report Indicators

* Proposals from leads = Proposals for opportunities were Opportunity Type = New
  + Total = Sum of proposals total amount gross
  + Discount = Sum of net proposed value
* Proposals – direct request = Proposals for opportunities were Opportunity Type = Direct Request
  + Total = Sum of proposals total amount gross
  + Discount = Sum of net proposed value
* Proposals – extensions = Proposals for opportunities were Opportunity Type = Extension
  + Total = Sum of proposals total amount gross
  + Discount = Sum of net proposed value
* Proposals – expansions = Proposals for opportunities were Opportunity Type = Expansions
  + Total = Sum of proposals total amount gross
  + Discount = Sum of net proposed value
* Proposals – cross sell = Proposals for opportunities were Opportunity Type = Cross - Sell
  + Total = Sum of proposals total amount gross
  + Discount = Sum of net proposed value
* Total proposals
  + Total = Sum of proposals total amount gross
  + Discount = Sum of net proposed value
* Leverage Degree
  + Total = Sum of net proposed value (all quotes created in the selected interval) / number of man – days
  + Target = sum (all man-days, per service \* target rate per service) / sum (man-days) from all quote created in the selected interval

Target rate per service is a standard rate set up by ENSIGHT for each service. In order to accommodate these values a standard price list will be created in CRM containing all target rates for each service provided by ENSIGHT.

* Estimated Value
  + Total = Sum of (discounted total value/quote \* percentage of closing from quotes – for all opportunities
  + Target – sales target by practice/business unit/client partner (yearly value set by the administrator at the beginning of the year, and split equally by selected interval – to be performed automatically)
* Contracted value
  + Total = Sum of contracted value from projects active in the interval (open + new/created)
  + Percentage = count of closed projects / count of active proposals (open +new/created in the selected interval)
  + Target = percentage of achievement for the selected period (e.g. 8.33% per month)

The report should take into consideration all active proposals for the selected interval. If the report is run for a previous period the system should allow the user to see the same data, even if there were some closed proposals in time.

Report Layout



### Neglected Leads Report

A list with existing leads that have no activity registered against them. The user will be able to select the period for analysis, how much time has passed since the last activity was registered against the lead.

### Invoicing List Report – data from NAV

Report Parameters

* Account

Report Columns

* Account Name
* Invoice No
* Invoice Date
* Invoice Value
* Due Date
* Paid Value
* Days Overdue

### Quote Revision Comparison – this will be a report showing the differences between different quote revisions: changes in price and services, to determine if the project scope has changed and why,

## Workflow

| ID | Category | Requirement | **Must Have (M)/**  **Future (F)** | Requirements Workshop Comments |
| --- | --- | --- | --- | --- |
| 41 | Workflow | The solution must support the ability to create custom workflows. | M | Microsoft Dynamics CRM utilizes Windows Workflow Foundation as the workflow engine. Workflows can be developed via the CRM UI as well as Visual Studio (custom workflow development).  The workflows will be used for notifications, if necessary. |

## Data Conversion

| ID | Category | Requirement | **Must Have (M)/**  **Future (F)** | Requirements Workshop Comments |
| --- | --- | --- | --- | --- |
| 42 | Data Conversion | The solution must have a method for importing accounts, contacts, leads, opportunities. | M | This can be achieved through the Data Import Manager, from csv. or XML files, based on template formats supplied by CRM |

## Financial Management Systems Integration

| ID | Category | Requirement | **Must Have (M) /**  **Future (F)** | Requirements Workshop Comments |
| --- | --- | --- | --- | --- |
| 43 | Integration |  | F | Integration between CRM and financial system is not in current project scope. |