Product Requirements Document (PRD)
Title: Real Estate (ERP + CRM)

Overview
This project aims to develop an integrated ERP (Enterprise Resource Planning) and CRM (Customer Relationship Management) solution specifically tailored for a real estate company. The primary objective is to unify various aspects of customer relationship management and project oversight, ensuring a seamless flow of information between sales agents and clients. The system will not only address the existing challenges of tracking sales agent and customer interactions across channels (calls & WhatsAPP) and agents but will also facilitate better project management for construction, allowing for real-time updates and improved customer transparency.

Objectives
The main objectives of the ERP and CRM system are to provide a centralised platform that can effectively manage customer interactions, track project status, and streamline communication between sales agents and clients. Currently, there are major gaps in keeping track of customer interactions, leading to inconsistencies in information shared by different sales agents. The project aims to rectify this by creating a single source of truth where all customer details, including their specifications and interaction summaries, are readily available. Furthermore, the system intends to enhance project visibility, track completion statuses of construction, and ensure timely alerts regarding payment obligations for contractors and vendors.

The objective is to provide information on project schedule and status to all divisions in the company so call for action can be taken on completion of milestones.

Scope
The scope of this project encompasses the full development and implementation of both ERP and CRM functionalities. The system will include customer management features that retain detailed profiles, interaction histories, and tracking of leads and payments. For the ERP segment, aspects such as project tracking, legal documentation management, contractor information storage, and payment notifications will be addressed. The development will proceed in three distinct phases, with each phase building upon the foundation laid in the previous one, ensuring a cohesive integration between the two systems.

Timeline
The ERP and CRM systems will be developed in parallel over three defined phases.

- Phase 1A: Establish the basic table structures for storing customer details and document storage.
- Phase 1B: Develop functionalities for WhatsApp integration to extract conversation summaries and a mobile application allowing engineers to update project statuses.
- Phase 1C: Create the user interface/dashboard for sales agents and finalise the integration between the CRM and ERP systems.

Each phase will have specific key deliverables that will provide incremental value and measurable progress toward project completion.

Risks and Mitigations

Risk	Mitigation
Integration of CRM with WhatsApp	Utilise existing documentation to enable integration.

User resistance to adopting the new system	Conduct comprehensive training and provide manuals.
Technical issues related to data migration	Ensure thorough testing and validation of data transfer.

Description of Features
CRM Features

- Customer Profiles: Track essential customer information such as name, age, and contact details alongside their preferences for property specifications, price, modifications etc
- WhatsApp Integration: Extract summaries of conversations automatically to maintain accurate interaction records.
- Dashboard Overview: Include an interface showing the total number of customers, their payment status, and leads with active conversations, ensuring timely follow-ups.

ERP Features

- Project Status Updates: Allow engineers to update the completion statuses of villas and inform sales through the CRM, customers and banks.
- Document Management: Store legal documents, floor plans, design modifications , additional costs and vendor information, controlled through user access management.
- Payment Notifications: Alert the accounts team about payment timelines for vendors and contractors related to completed work. Also, accounts team shall be updated on pending payments from customers.
- Mobile Application for Engineers: Engineers can update completion status and upload photos to share with customers.
- Payment Requests Notifications: Email notifications for the accounts team to address payment requests.

User Experience (UX)
UX considerations will focus on creating an intuitive design for ease of use for both the sales agents and the engineering team. For CRM, a user-friendly dashboard will present key metrics, customer statuses, and reminders for follow-ups. For the ERP, the mobile application for engineers will enable swift updates and photo uploads with minimal clicks. Designer workflows will integrate drag-and-drop scheduling for appointments and simple access to frequently used features, ensuring a smooth and efficient user experience across the board.

Dependencies
The project has some dependencies that include decisions on the technology stack, which will be based on AWS, Azure, or GCP for cloud hosting solutions. These cloud platforms are essential for ensuring scalability and reliability throughout the project's rollout. Additionally, successful integration with third-party applications like WhatsApp relies on their APIs and supporting documentation.

Performance
The performance goals for this system include ensuring high availability and responsiveness for users interacting with both the ERP and CRM components. Given the real-time nature of customer interactions, the system will be expected to return relevant information and updates promptly, with minimal latency during peak operations.

Metrics

The following key performance indicators (KPIs) will be tracked to measure the effectiveness of both systems post-implementation:

- CRM Specific: User adoption rates, lead conversion rates, customer satisfaction scores, and average response times to inquiries.
- ERP Specific: Project completion rates, time taken to resolve issues using the documentation system, customer feedback on builder communication clarity, and retrieval frequency of stored documents.

Additional KPIs

Based on further discussions, the following additional KPIs for tracking the success of the CRM and ERP systems have been identified:

- CRM: Number of active leads, time since last conversation for prospects, and the number of conversations logged per agent.
- ERP: Frequency of document retrieval and average time taken for project updates to reflect in the CRM.

Conclusion

This PRD outlines a comprehensive approach to developing an integrated ERP and CRM system for a real estate company. The conversation highlighted the importance of unifying customer information and project management into a single platform to enhance operations significantly. The next steps involve confirming specific parameters for each phase and engaging stakeholders for input on the finalised design and features.

Additional Information

Further discussions and refinements on requirements, user personas, or potential budget allocations can be scheduled as the project progresses. If any questions arise or additional inputs are needed, please feel free to reach out at any time.