CRM REQUIREMENTS

Ref	FEATURES	DESCRIPTION	COMMENTS	MICROSOFT/ECLECTICS COMMENTS
	Case management			
1.1	New case form	Populates customer details Case details Case status; progress or resolution	One view	
1.2		Description to auto populate from the email body		
1.3	Balances	To provide real time balances from Core.	Web service (integration with core)	
1.4	Statements	Ability to spool historical and interim statements	Show transactions since last statement date.	
1.5	Customer info 360 customer view	All the services and products a customer has with us could appear on the account page , i.e mobile banking, online banking, loans, Credit cards among others to enable us cross sell	To provide field to be populated from CBS	For cross selling purposes
1.6		Ability to sent statement/balance via customer preferred mode of communication. Email/sms from CRM		
1.7		Customer mandates should be viewed in CRM for KYC		
1.8		Ability to select multiple assignees; Department and CCC agent	Department for resolution, CCC to communicate back to the customer.	
1.9		Ability to flag a case depending with priority and future escalations should show the same.		
1.10	Case distribution	Equal distribution of cases to agents	Dash boards of daily allocations to an agents	

CRM REQUIREMENTS

Ref	FEATURES	DESCRIPTION	COMMENTS	MICROSOFT/ECLECTICS COMMENTS
1.11	Case allocation	Case moves with a link to the relevant department on assigning.	Email to the department to have an email link to the case	
1.12	360 view of all customer cases	Ability to view all cases. Closed or open under a customer.		
1.13	Emails	Emails where Customer care is copied, cc'd or bcc'd to form cases. All emails to form case; not attaching to old cases on subject basis	q- manager; workflow for CC	
1.14	Emails	Emails on forwarding, carry the from name but the email address of sender is not attached.	Email address to be incorporated when forwarding a case	
1.15	Emails	When a mail is flagged for follow up on due date, Have a reminder pop up put to alert the agent on the screen. Notes to move with case escalations	Color code on the queue	
1.16	Emails	Enable spell check capability	IE 10	
1.17		To include other fonts, lock the font to book antique		
1.18	Cases	Also the users signature to be attached to communication outside CRM.	Once a template is made, future emails should auto populate the signature.	
1.19	Escalation triggers	Escalation triggers to the user before the case TAT elapses	Dash board for outstanding cases per day	
1.20	Escalation triggers	Triggers to Supervisor for all cases with TAT about to elapse	dashboard	
1.21	Escalation triggers	Triggers to the supervisor for all the cases past TAT	Dashboard	

CRM REQUIREMENTS

Ref	FEATURES	DESCRIPTION	COMMENTS	MICROSOFT/ECLECTICS COMMENTS
1.22	Escalation triggers	• Triggers should be available throughout an active case period - Currently dropping after midnight.		
1.23	Triggers	Escalation triggers to bear the CRM case link, to supervisor or user.		
1.24	Blocked mails	Blocked email messages creating active cases. Should not be included in open/active case count	Should not form cases (Auto archive)	
1.25	Undelivered mails	Auto delete after a specified period to free DB space	(Auto archive)	
1.26	Case flags on main queue	Escalations to be effected for; • Emails/Cases on the main queue should have priority flag and time aging flag.		
1.27	Dial up	Autodialing from CRM should be activated		
	Customer info	Real time update on accounts/ customer information from Core .To include static data.	Web service (integration with core)	
1.28	Case forms	Different case forms and fields for different channels used	Email/sms/phone/Social media	
1.29	Case Search	Ability to search with case number, name or date for a closed or active case		
1.30	**CRM Access by different business units**	Ability to use CRM in different locations and able to view only allocated cases	Agents to view what is relevant to their department; overall management to be done from contact centre.	

CRM REQUIREMENTS

Ref	FEATURES	DESCRIPTION	COMMENTS	MICROSOFT/ECLECTICS COMMENTS
1.31	**Knowledge base**	Ability to update the knowledge base items via PDF/word/excel upload into CRM		
1.32	**Customer Contact**	Ability to detect duplication and warn the user;		
1.33	**CRM mails**	All mails sent from CRM to retain a copy in outlook sent items		
1.34	**Out of office responses**	Out of office responses do not attach themselves to the main case but form separate cases	Want to attach original case.	
1.35	**Social media**	Integration with social media and management with ability to mine all mentions in the net. Keep historical data/communications Facebook, Twitter, Google plus, Linkedin	Mentions mining tool	
1.36	**CTI Integration**	Incoming calls to automatically pick the customer details and display their details cases and outstanding cases. It should also trigger a case form so that the call details can be captured automatically.		
1.37	**Calls cases**	Ability to send sms or email with case number/ticket no after saving the case	To the customer contact/customer details	
1.38	**SMS**	CRM is not auto populating the customer details on receipt of SMS from Wallet. Should show customer details/name on receipt	DB to DB details	
1.39	**Web- chat**	Integration with chat and keep history of the chats		
1.40	**Customer Profiling**			
1.41		Ability to profile our customers on product services		

CRM REQUIREMENTS

Ref	FEATURES	DESCRIPTION	COMMENTS	MICROSOFT/ECLECTICS COMMENTS
1.42		Ability to profile our customers on profitability to the bank		
1.43		Ability to measure/determine frequent call centre customers		
1.44	Credit card data	Integration with Visa web to obtain card details and balances		
1.45	Integrations	One agent view of the other bank systems, wallet, online account opening, Commerce 360, fortress, online banking, omniflow, Elma	360 view	
	REPORTS	**Additional to what we have**		
2.1	Agent performance	Reports to show cases handled by an agent for a specified period and with TAT and outside TAT	Real time agent cases/outstanding/allocated cases	
2.2	Call centre daily report	All cases received for a day/month/year;		
2.3	Department service level	Report to show cases allocated to various departments and TAT		
2.4	Call centre Service level report	Report to show overall case handling; within TAT, above TAT.		
2.5	Trend analysis reports	Reports to show frequent queries/complains for a period.	categories	
2.6	Complains report	Top 10 complaints in a period; week, month; trend analysis. Analysis of the specific complaints over a period		
2.7	Complain report- detailed	Comprehensive complain report for a specified period, month, quarter, year		

CRM REQUIREMENTS

Ref	FEATURES	DESCRIPTION	COMMENTS	MICROSOFT/ECLECTICS COMMENTS
2.8	Dash board	Dash board displaying all modules performances; sales, marketing and service	One view of CRM system activities for a specified period	
2.9	Cases reports	Outstanding cases report for a specified time period; days, week, month		
2.10	Summary of customer cases/activities	Ability to spool a report per customer/contact of all activities (closed or active)		
2.11	Dashboards	Ability to drill-in on service dashboard		
2.12		Severity reports on service; trend analysis per month, quarter, year.		
2.13	Outstanding cases	Report for all active cases per agent for a specified period	Sent via email	
2.14	Active cases	A summary of all outstanding cases per departments	Sent via email	
2.15		Outstanding cases report per channel		
2.16		Channels used report; closed and active		
2.17		Service level reports per channel; email, calls, sms, social media, web chat		
3.0	**Marketing**			
3.1		Set target marketing campaigns on specified customer target group	Dynamic list	
3.2		Analyze campaign effectiveness and conversions		
3.3		Ability to send bulk emails to a target group		

CRM REQUIREMENTS

Ref	FEATURES	DESCRIPTION	COMMENTS	MICROSOFT/ECLECTICS COMMENTS
3.4		Ability to send bulk sms to a target group		
3.5		Report to show a marketing campaign performance		
3.6		Report to show campaign status		
3.7		Report to compare campaigns to similar target group.		
4.0	**Sales**			
4.1		Lead conversion and follow up for closure management		
4.2		Ability to track leads		
4.3		Ability to monitor agents/assigned performance		
4.4		Report to show pipeline status		
4.5		Report to show lead source effectiveness		