

Title

Obero — Redefining Customer Relationship Management (CRM) for vendors to configure and manage customers efficiently.

Problem Analysis

Obero is a software company that focuses on IT Services & Consultancy, offering Software as a Service (SaaS) solutions within the Dutch online ordering and delivery sector. Founded in 2020 by Alexander Clemencia, Izahir Clemencia, and Mohamed Dahou, Obero's goal is to enhance and provide better customer experiences within businesses, prospecting in ordering solutions for better sales efficiency. Obero's operations are based in the Netherlands, operating with 17 employees in total.

Obero started its operations using a source-based platform, built and customized accordingly using licensed software written in PHP language with the Yii framework, known as the Customer Relationship Management (CRM), to be used for administration and management of Obero's customers — businesses within the food & beverages industry.

Obero's CRM Platform is a software application designed to help Obero in managing their customer relationships more effectively, utilizing a range of features and tools within the platform that assists Obero to communicate datasets of in-store processes with their customers. The platform also has a storefront configuration module, which Obero uses to help customers in creating digital menus and ordering system for their businesses.

The problem arises when requests for customer service is required:

- a. There is a high technical jargon that surrounds the usability of Obero's CRM platform; troubleshooting takes long amounts of time and can only be conducted efficiently with Obero's employees. This slows the maintenance duration for users who are not familiar to the platform, and without the presence of Obero's employees, would be impossible for them to self-configure.
- b. The platform is far from being user-friendly. As mentioned, the affiliated users, being businesses within the food & beverages industry, cannot easily navigate through the platform without hands-on guidance from Obero employees. This creates a strong sense of dependency on Obero as users are unable to self-configure, due to the platform's cluttered interface and cramped datasets that needs complete refurbishing.

The size of the Obero team is relatively small, and is not sufficient enough to hold large amounts of customer requests. As a result, the stakeholders are shifting strategies to focus on a *partner model* — involving vendors who act as intermediaries between Obero and customers. That way, the vendors will manage their own customers, while Obero focuses inwards on providing a user-friendly platform that vendors can subscribe and use

for customer management. This allows Obero more space and time to configure the CRM application, instead of selling and configuring it directly with/to customers.

With feedbacks from customers, the platform needs to be revamped as a Progressive Web App (PWA) due to its *all-in-one solution* — delivering the app to be usable across all devices without the need of app-store distributions, focusing upon its infrastructure and user experience for better efficiency and usability, minimizing service durations and making it self-serviceable for both vendors and customers.

Assignment

Hence, the purpose of this project is to evaluate, re-design and assist in implementing Obero's CRM Platform as a PWA for better efficiency, scalability, reliability and overall usability to vendors and end-customers.

Relation to Research

Topics that are going to be encountered within the project would be:

- A. UI/UX of CRM, and real life use cases applied within the Food & Beverages industry.
- B. Operationals and in-store processes of businesses within the Food & Beverage industry.
- C. Roles and dependencies between Supplier, Vendor and Customer entities within businesses.
- D. Angular framework to implement working concepts (Angular will be used as stated by the stakeholder as the future framework for the platform).
- E. Design principles of Software as a Service (SaaS) based applications.
- F. PWA principles and responsive design for multiple screens.

With the topics ready, the potential main research question is:

1. What factors can Obero's CRM Platform be improved on to allow better efficiency, scalability, reliability and usability for their vendors and customers?

Guidance

Daily stand-ups will be held throughout the entirety of the project; an Operations Manager is present during working hours for daily management of employees. Front-end guidance is available from the technical advisor for implementation phase, with weekly demos and retrospectives planned in respect to the sprints. The company mentor will be available 2-3 working days per week.

Personal Development Goals

| PDR | HOW TO WORK ON THIS (IN MORE DETAIL, THIS S.M.A.R.T. IF POSSIBLE) |
|---|--|
| Gain additional skills in Front-end development through familiarisation with the Angular JS and Tailwind CSS Framework. | Attend and gain knowledge from courses offered internally and externally from the company; cross-check validations frequently with project manager and technical advisor. |
| Better timeframe management and work completion per sprint & improving Agile Scrum methodology. | Set up a personal taskboard and link work related tasks to that taskboard; actively updating associated tasks to the sprint board and personal portfolio; reducing buffer time by completing relevant tasks and fast validation from stakeholders. |
| Develop a professional proactive discipline towards associated stakeholders. | Engage in active conversations between mentors from the company and university; urge mentors and seniors for validation and peer review throughout the course of the workday; utilize communication platforms that are used within the company. |
| Explore and advise other potential working methods for better productivity to the company. | Conduct observation using existing research methods before the start of every sprint, and utilize some aspects within the working environment; experiment upon applying different approach instead of sticking to pre-determined paths. |
| Practice flexibility in mediating different scenarios and situations throughout the course of the project. | Take feedbacks and/or critics with an open-mind; avoid being too defensive of own work/deliverables; turn criticism into a discussion that is beneficial for the completion of the project. |