

Requirements

Make a personal CRM website that provides the basic function of customer relationship management and facilitates communication between users.

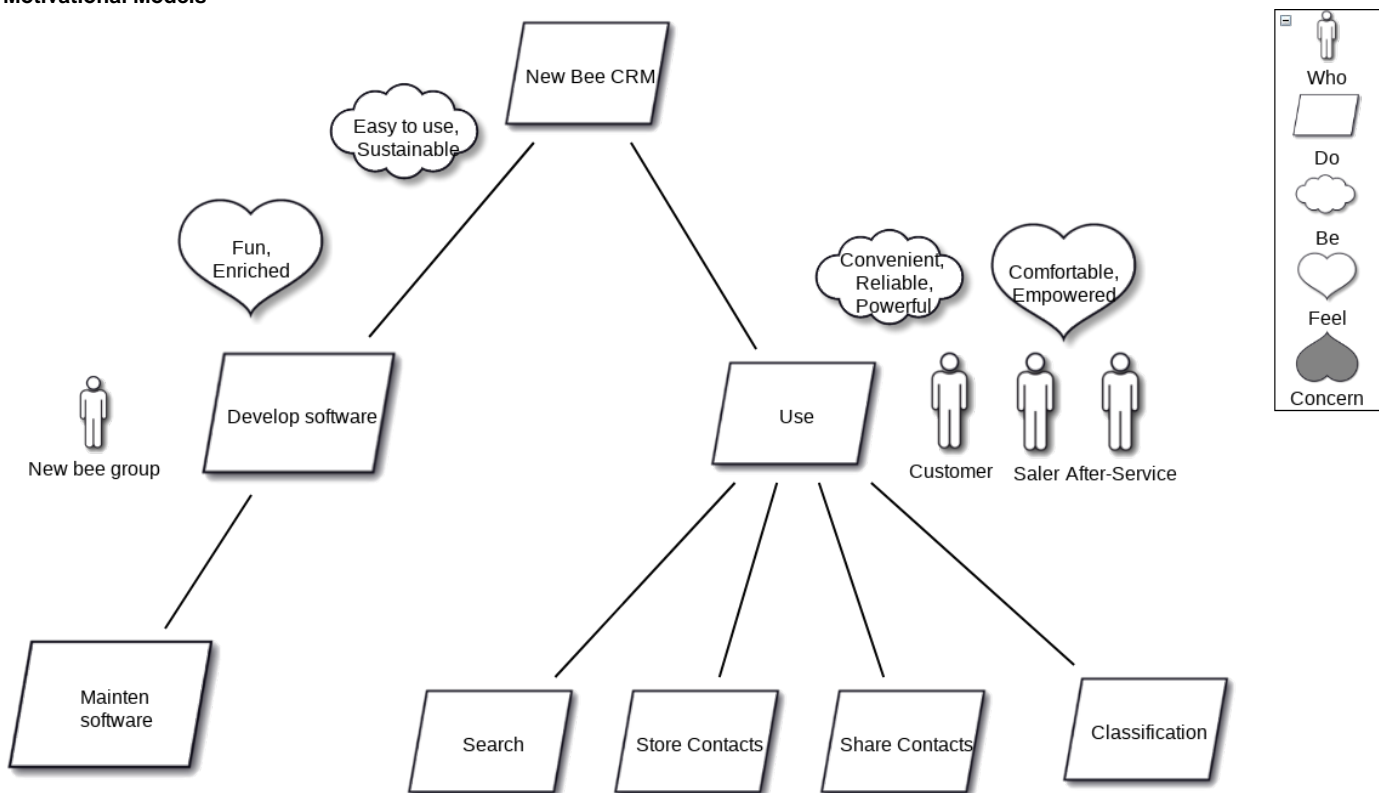
Basic functions of CRM:

1. Store the information of customers (connect details, introduction, and allow the customers to fill in their own information)
2. Functions to define the friends and choose to add others as 'friend'
3. User searching functions (by name/ phone number/ introduction information)
4. Characterize customers (Store the key characteristics of users, we can provide characteristics or allow users to create on their own)
5. UI requirements: not be hard to view, not hard to find buttons

Functional Requirements:

- Search functions: search the DB by name/contact/id/characteristic
- classify all users by their characteristics
- Complete the information of customers (name, phone number, connect with friends)

Motivational Models



User stories

ID	As a <Role>	I want to <Do something>	So that <Achieve some goals>	Priority	Estimation
1	user	create account	I can start using the product	HIGH	5
2	user	edit personal information	I can share personal information to others	HIGH	5
3	user	log in	I can use the product	HIGH	5
4	user	add/edit profile image	I can show personality	HIGH	8
6	developer	make a homepage	user can find signup and login button in the homepage including product introduction and developers information	HIGH	8

7		let user sign up with their google accounts	users do not need to register new account	LOW	8
8	developer	make a dashboard	user can visit different functions such as contacts and tasks	HIGH	8
9	user	be able to change the colours of the dashboard	user can choose their favourable color	LOW	8
10	user	search for other user by ID	I can make new friends by searching their userID	HIGH	3
11	user	add the user as friend	make conversation with others	HIGH	5
12	user	add the function of log out	users can log out	HIGH	5
13	user	switch account	users can switch between different accounts	LOW	5
15	user	add remark	users can use remark to remember specific customers	LOW	3
17	user	delete friend from contact lists	users can end the relationship with them	HIGH	5
18	user	set up groups for different customers	users can manage the same type of customers together	MEDIUM	3
19	user	a log in page	enter log in information	HIGH	5
20	user	a register page	enter register page	HIGH	2
21	developer	build a database	restore user information	HIGH	3
22	user	have a information page	present my information to others	HIGH	5
23	user	set privacy to my information	others can't see my specific information	MEDIUM	13
24	user	have a function in contact page to search existing friend	the user can type in ID to search for the user	HIGH	13
25	user	can get the result of searched friend(s)	I can add see that user's information	HIGH	2
26	user	can change ID as the user wants	I can have my own specific identity	HIGH	5
27	administrator	make a web page for admin	view all users	HIGH	5
28	administrator	ban/unban a user	that user can(not) login	HIGH	5
29	developer	build a database for admin	admin info can be stored	HIGH	5
30	user	have a information entering page after registering	I can initialise my profile	HIGH	8
31	developer	Edit the UI style of change profile page	improve the UI	HIGH	5
32	developer	Update page after user finished editing	The user do not need to refresh the page	HIGH	8
33	developer	Redesign the homepage and login/register	improve the UI	MEDIUM	5
34	developer	Fixing error in log out and log in with different account	fix the bug	HIGH	8
35	developer	deploy our web	User can access our CRM with url directly	HIGH	8
36	administrator	Change user information	the user information can be modified by admin	HIGH	5

Personas

New-Bees persona CRM User Persona 1

Janet Watts

Age: 26

Occupation: Auditing Clerk



Customer Profile: Janet has working in her industry for 4 years, now she had developed a group of loyal customers. It is usual for her to meet up to 10 clients every week, as there are always so much details she need to confirm with them. While after years of diligence, she's looking for a new way to maintain contact with her customers

Motivations

- Good industrial reputation
- Increased Salary
- Getting Promotion

Frustrations

- Hard to arrange so many meetings with clients
- Difficult to maintain good relationship with all customers

Goals

- Maintain good relationship with customers
- Plan her routes efficiently
- Contact all clients conveniently .

Preferred Channels

- Email
- Linkedin
- Referral

New-Bees persona CRM User Persona 2

Franklyn Tyler

Age: 24

Occupation: Bank Clerk



Customer Profile: Mr. Tyler started his career recently. He is ambitious and aggressive, and tries to develop large number of clients from scratch. Every night he is dreaming about a large bunch of customers come to the bank for him and become his loyal customers.

Motivations

- Having more clients
- Successful career
- Channels for communication

Frustrations

- Lack of channels to meet new clients
- Hard to keep contact with new clients

Goals

- Meet more clients
- Establish client loyalty
- Develop his own client groups

Preferred Channels

- LinkedIn
- Twitter
- Google
- Email

New-Bees persona CRM User Persona 4

Sam Simon

Age: 46

Occupation: Company CEO



Customer Profile: After years of operations, Sam seize the opportunities, and make his company the lead in the industrial of his region. As business and revenue continues to grow, now he has over 200 employees, and managing all the employees and clients is becoming a more difficult task for him

Motivations

- Business grows
- Loyal clients
- Efficient communication channels within the company

Frustrations

- Too much clients and employees to manage
- Cannot hear from clients and employees directly -- He often only get reports from middle management level.

Goals

- Communicate directly with employees and clients efficiently
- Hear the ideas and suggestions from others, rather than reading company reports all the time

Preferred Channels

- LinkedIn
- Email

Eliza Carrillo



Age: 20

Occupation: Undergraduate/Casual Designer

Customer Profile: Eliza is still a college student, while she devote herself into graphic design to release her Artistic talent, and she love her tiny business. Her clients generally are from the internet, and sometimes she feel exhausted since she need to both pursue school work and part-time jobs.

Motivations

- Make money from graphic design
- Do not fail college subjects
- Frequent communication with Clients

Frustrations

- Hard to define a group of clients since they are from internet
- low loyalty of customers

Goals

- Have more engaged communication with customers
- Get to know more people on social media to promote her works

Preferred Channels

- Instagram
- Facebook
- Twitter