Business Requirements Document (BRD)

Project Name: CRM tool development

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Ninez IT-Tech Solutions Pvt. Ltd.

1 Document Revisions

Date	Version	Author	Document Changes
24/04/2023	1.0	Tara Singh	Initial Draft

2 Approvals

Role	Name	Title	Signature	Date
Project Sponsor	Tara Singh			
Business Owner	Tara Singh			
Project Manager				
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Development Lead				
User Experience Lead				
Quality Lead				
Content Lead				

3 Introduction

3.1 Project Summary

3.1.1 Objectives

- Develop an Interactive Customer Management System (CRM) that reflect the end-to-end flow of the Customer management journey along with the Status Dashboard.
- Avoid duplication of Customer Data and reduce time to production for existing workflow.
- Support Customer searching with names, information or business descriptions.
- Tracks changes to Customer information including new customer, modified details, and Customer to be archived.

3.1.2 Background

Timely and accurate synchronization of Customer data from Lead generation to Lead Converted as customer will reduce efforts across the enterprise by eliminating duplicate names.

3.1.2.1 Business Drivers

- Customers are looking for faster updates to information on the status and we need to keep them following up, and may consider competitors if needs are not met.
- Development group requires a scalable solution to track and being deployed into all environments to better manage resources.

3.2 Project Scope

To Develop the effective Customer relationship Management (CRM) tool where Customer journey will be reflected in detailed manner as well as a Dashboard which will help us to track and follow up to succeed the Lead.

3.2.1 In Scope Functionality

- Create name records for customer journey by category of information
    - Lead generation
    - Sales
    - Resume Making (Expert Resume Coach)
    - Training (Technical Expert)
    - Marketing
    - On boarding BGC

- Ability to create/delete information names restricted by role
- Search by name, date, last modified
- Synchronize Data across Customer Journey.
- Provide Reports on customer journey by time period and team

3.2.2 Out of Scope Functionality

- Delete record by User

3.3 System Perspective

We will use the basic to advanced customer data management systems for data collection and management for prospects and customers then try to keep this information organized with help of advanced technology.

3.3.1 Constraints

- Impending changes to privacy regulations may impact data dictionary design.
- Timeline for enterprise platform updates will impact execution of testing plan.

3.3.2 Risks

- This Project may limit availability of development and QA resources, necessitating outsourcing or additional budget requisitions to meet the anticipated timeline.

3.3.3 Issues

- To Be drafted

4 Business Process Overview

We have six departments involved in Bench process flow creation.

1. Lead generation
2. Sales
3. Resume Making (Expert Resume Coach)
4. Training (Technical Expert)
5. Marketing
6. Onboarding BGC

4.1 Process Diagram

Process Diagram is attached as Annexure :1.

4.2 Business Process for making effective CRM.

4.2.1 Leads Generation

Designation in Lead Generation department Hierarchy: -

Lead generation Executive (LGE) Lead Executive
Lead Generation Specialist (LGS) Lead Specialist
Lead Generation Manager (LGM) Lead Manager

Roles & Responsibilities:

A. LGE will generate the leads from LinkedIn, FB and other available resources (Manual Leads and Direct Resume download)
B. LGS will source and make strategies to find leads from different sources like portals, Recruiter connections from company LinkedIn Profile and other available sources which they have to explore.
C. LGS will also look after the work and targets given to LGE. And will make sure all the tasks given to LGE is followed up on daily basis.
D. LGS will also look after the connection requests sent and chat with candidates done by LGE.
E. LGS will be also responsible to generate Leads with their own sources/resources.
F. LGE is responsible for generating 15 Resume downloads and 5 manual Connections from LinkedIn or any other resources they have been provided.
G. LGE should be able to collect following Data to consider as a proper Lead for Manual Connection:
    - Date:
    - LGE Name:
    - Assigned Sales Person:
    - Candidate Name:
    - Candidate Contact Number:
    - Candidate LinkedIn ID:
    - Candidate Email:
    - Candidate Technology:
    - Country:

- Visa Status:
- State:
- Scheduled Call Time:
- **Lead Status (Not Eligible(NE), Successful On-Board(SOB), Short Follow-up(SFU), Long Follow-up(LFU), Training(T), Marketing(M), Not Interested(NI), Back Out(BO), Hold(H), Placed(P), Marketing Re-Started(MRS) :**
- Lead Source (LinkedIn, FB, Job Portal, Reference, Recruiter(It can be Internal Recruiter or Outside Company Recruiter):

H. Individual LGE is assigned to Sales Executive and they will input Leads in the Manual connections Sheet.
I. LGS will make the Manual Connection Sheets individually of all LGEs' and should be shared in Google Drive with LGM, Sales Manager, Operations Manager and CEO.
J. LGS will make sure all the given targets to LGEs' are completed every day and take a stand-up meeting on how to achieve the daily targets, if they are facing any difficulties in achieving targets. LGM will also be present in the meeting.
K. It is LGM responsibility to divide and give the calling leads to Sales Executive generated by LGE.
L. LGM requires to take weekly meeting on the performance of LGE and LGS. All reporting should be shared by the end of Friday evening to the Operation Manager and CEO.
M. LGM is also responsible for generating leads on their own.
N. Targets for LGS will be 5 Manual connections per day.
O. Targets for LGM will be 5 Manual connections per day.
P. LGM will be responsible for distributing leads to LGS and LGE if any portals are purchased to generate leads.
Q. LGM, LGE and LGS can generate leads who are not interested in looking for a job, but interested in having Interview Support or Training.
R. If failed to perform any of the tasks mentioned above will result in strict actions.
S. It is LGM and LGS duty that the connection notes sent by LGE is in a proper way.
T. All connections which are accepted from LinkedIn has to be noted down in the Sheet.
U. LGM is responsible to identify closures of each LGE at the end of the month. Sheet should be maintained every month of each LGE and LGS. Closed candidates' lead should be coloured in Green.

4.2.2 Sales Department

Designation in Sales department Hierarchy:-

Sales Executive (SE)
Lead Sales Specialist (LSS)
Sales Manager (SM)

Roles & Responsibilities:

1. Sales Executive is responsible for calling all the leads which have been generated by the Lead Generation Department.
2. Sales Executive and Lead Sales Specialist will focus on their own Leads, Manual Connections and Direct Resume Downloads.
3. LGE & LGS will be assigned to each SE.

4. All Leads which SE, LSS and SM contact should be transferred or insert in CRM or Trello.
5. Following Information should be collected from a Lead by SE, LSS & SM:
    - Reference/Source:
    - Area of Interest:
    - Candidate Name:
    - DOB:
    - Visa Status:
    - Time in USA/Canada:
    - Masters'/Bachelor's:
    - Email ID:
    - Contact Number:
    - Location:
    - Technology:
    - Experience:
    - Relocation:
    - Training/Interview Support Required?
    - Remarks:

6. SE, LSS & SM will require to maintain an Excel Sheet too with all the above-mentioned information.
7. If candidate is Interested and ready to pay the upfront charges, it should be forwarded to accounts department to generate a Payment Link. (Send to (VP) as of now).
8. Once the Payment is done from the candidates end Accounts Team will inform Sales Team regarding successful Payment.
9. Email should be sent to Accounts Team mentioning following details of Payments:
    - Name Of the Candidate:
    - Country's
    - Technology:
    - Amount Received:
    - Date of Payment:
    - Payment Plan:
    - Services Availed (Interview Support/Training):-
    - Mode of Payment (Stripe/Remotely):
10. To send Agreement copy, SE, LSS & SM should message on Teams in Sales Team Group with following details: (It is sent by Danny Cooper(VP))
    - Candidate Name:
    - Candidate Email/Contact Number:
    - Technology:
    - Country:
    - Offer Given:
11. When the Agreement is signed Danny Cooper will comment on the message sent in Teams.
12. After that SE, LSS & SM will move the Candidates' Trello Card to the Successful On-Board List.
13. They will also mention the Remarks "Successful On-Board" in their Excel Sheet.

14. The Sheet shared by LGE & LGS to SM, SE & LSS in that too Sales Team should write the Status of the candidate in the "Lead Status" section.
15. If a candidate is Interested in Training, the Lead should be forwarded to Technical Team Manager (TTM).
16. TTM will have to Email concerned SE, LSS & SM letting them know that the Training is started.
17. Parallels the same Lead should be transferred to Expert Resume Coach (Resume Making Department).
18. Once the Resume Making is done, Resume Expert (RE) will mail the Resume to TTM for Resume Understanding along with the Training. Informing SE, LSS, SM & Operations Manager (OM) in separate Mail that the Resume Making is done and passed on to the Technical Department for Resume Understanding.
19. Once Resume Understanding and Training is completed, TTM will move the candidate to Marketing Department (Marketing Manager) keeping SE/LSS & SM in CC Email.
20. When candidate gets placed, Lead Status will be changed to "Placed" in the Sheet shared by LGE & LGS.
21. Payment collection will be done by Accounts Teams Only. SE, LSS & SM will only get involved if they are allowed to collect by Operation Manager.
22. If candidate is in SFU & LFU Status, than it is LSS and SM duty to make sure the follow up is done in constant level according to the time given by Candidates.
23. If candidate is not Interested, SE, LSS & SM can convince or try to sell other services like Training or Interview Support.
24. LSS will take daily stand-up meeting of SE to make sure they reach their daily targets.
25. SM will take a weekly meeting to know the status of targets and encourage/give strategies to Sales Team on achieving the given Targets.
26. SM will share all the Reports to Operations Manager and VP on every Friday by the end of the day.
27. SE will have the targets of 4-5 hours of call duration. + They have to close 7 New Profiles every month with $6000 USD as upfront.
28. LSS will have their individual target of $10,000 USD upfront amount per month.
29. SM should make sure all the given targets are fulfilled and give SE & LSS tips/instructions to achieve the numbers.

4.2.3 Marketing

Marketing Team hierarchy

Bench Sales Executive
Bench Sales Specialist
Team Lead
Bench Sales Marketing Manager

1. BSMM will get the profile from TM (Technical Department Manager) after the completion of RUC.
2. BSMM will pass on the profile to TL where TL will have to take the initial call of the candidate.
3. TL will be responsible for taking all the initial details which we say as marketing details.
4. After taking required details from the candidate on call and collecting all documents, they will pass on the candidate to the available recruiter.

5. TL will also be responsible to send a welcome Email stating candidate, that who would be their recruiter, recruiter's contact details along with TL and BSMM contact details. Also technical manager's contact details should also be mentioned.
6. Once all this process is done, BSE & BSS will start the marketing of the candidate, they will also need to make an initial call to the candidate and introduce themselves stating they will be their point of contact during the marketing process and from day 1 they will start the marketing.
7. All the transfer process and data collection process from candidates has to be completed within 1 Day, no more than 1 Day will be required/taken to collect the information, documents and handing over the profile to BSS & BSE after BSMM receives the profile from TM(Technical Manager).
8. TL will be responsible for taking daily stand-up meetings and give the reporting to BSMM by the end of the day.
9. BSMM will be responsible to take weekly meetings and give the reports to Operations Manager & CEO.
10. BSS & BSE will be responsible for making their own reports of the candidates, stating their applications, submissions and Interviews.
11. This sheet should be shared with TL & BSMM.
12. TL will be responsible for making the Interview sheet of the candidates where they have to mention all the candidates scheduled and completed Interviews and this sheet should be shared with BSMM, TM(Technical Manager), OP and CEO.
13. TL will be responsible to make sure that every Interviews and Assessments should get completed on the given time without any lack/ source or negligibility.
14. BSE & BSS will have to do marketing on 20 different portals mandatory for each candidate. There should be a minimum of 100-150 applications per day for every candidate they have.
15. Minimum of 10 Submissions and 3-4 Interviews should be scheduled every week of every candidate BSS & BSE have.
16. TL will make sure that BSS & BSE has 20 portals pinned in their browser for every candidate.
17. BSS & BSE should inform the candidate in the first call that, if they receive any Interviews, do not directly schedule them, they need to check the availability of the Support person whether they are available on the given time or not OR check what are the availability schedules of the Interview Support Person.
18. Once the BSS & BSE receives any Interview or Assessments schedule, they will need to report that down to their Reporting Sheet which is shared with TL & BSMM.
19. TL will note down those Interviews and Assessments in their reporting Sheet which is shared with BSMM, OP & CEO.
20. TL is responsible to make sure that the scheduled Interview & Assessments are completed on time. They will also be responsible to make sure that at the scheduled time Recruiter, Candidate, Interview Support Person and the client who is going to take the interview are available at the given time.
21. To make sure for that BSS & BSE, TL & Technical Manager should be responsible for the following process:
    1. BSS & BSE should shoot an Email before 30mins from the candidates Email whose Interview is scheduled to the Client or Vendor that whether the Interview is still ON or not and making sure the Interviewer will be available at the given time.

2. BSS & BSE will be responsible that the Interview Support Person is available or not at the given time. (This should be done before 45mins.)
3. BSS & BSE will make sure that the candidate is available at the given time where they need to instruct them on the attire and gestures, they have to make while on Interview if it is a Video Interview. (This should be done before 40mins)
4. BSS, BSE, TL & Technical Manager will make sure that the Interview Support person and the candidate is connected before 15-20mins of the Interview schedule to make sure everything is perfect and tested.

22. Once the Interview is completed BSS & BSE will shoot an Email from candidates Email to the Interviewer stating "Thank You Note".
23. BSS & BSE will be responsible to take regular updates and follow ups of the completed Interviews
24. On every Submissions and Interviews, BSS & BSE will be responsible to make connections of the Vendors & Interviewers on LinkedIn from candidates LinkedIn and Personal LinkedIn.
25. BSS & BSE will be responsible for constantly creating Vendors List according to the Technologies.
26. Once the Candidate gets an offer, TL will be responsible from there onwards to Shoot and Email to CEO regarding BGC and PO Email to management@Nineztechllc.com
27. BSMM will be responsible to make a monthly PO Sheet of the candidates placed and send the reports to CEO and OP.
28. BSMM will be responsible to make sure the given Target of PO in the particular Month is completed.
29. If candidates require Compliance Support, BSS, BSE, TL & BSMM will immediately pass on the case to OP & CEO.
30. For all other queries from candidates should get resolved by TL & BSMM. No queries will be forwarded to upper management unless and until it cannot be handled.
31. BSE, BSS & TL Day to day activity after coming to office will include checking out new Emails of candidates, scheduled interviews and taking a Morning call with candidates to check out their availabilities of that particular date.

4.2.4 Interview Process

All the Recruiters need to fill the interview form and send it to their seniors

TL need to coordinate with the technical team if candidate required interview support or any resume understanding session.

TL need to get in touch with the technical guy before 24hr prior notice, and 20mins before at the time of interview.

Once the interview is completed TL need to take the feedback of interview call from Candidate and technical person.

TL needs to share all the interviews feedback to the management.

Recruiter needs to inform candidate regarding thank you note which candidate has to send to interviewer after the completing the interview.

TL need to connect with the candidate to explain the process of interview support system with live examples.

4.2.5 Technical Process

Training and Resume Making/Interview Support Provider

1. Call do employee
2. Fill up the check list
3. Create a Resume
4. Send resume to Person for checking and create Email
5. Send for RUC
6. Send for Marketing
7. Arrange Interview support for the candidate by coordinating with IS and Candidate
8. Arrange training for Candidate
9. Take an update proxy and interview
10. Send the training material to the candidate regarding technology quarry.

4.2.6 Onboarding (BGC)

A, on boarding will be taken care by the Danny Cooper and Marketing TL should be in touch with the on boarding team to make sure to run the BGC smoothly.

Technical Department

Recording of each task is compulsory

1. Internal Support
2. External Support

Internal Support:

- Training Process:
  - To begin the training process, the sales team will initiate an email to start the training with an internal expert. The Training Coordinator will be responsible for scheduling an internal training call with the candidate and scheduling the training with the internal trainer.
  - After scheduling the training, the Training Coordinator will send an email to the candidate with the training schedule and syllabus, cc'ing the sales person and training@Nineztechllc.com.
  - During the training, the Technical Expert/Trainer will be responsible for ensuring that the training is conducted on time as per the syllabus, with each session lasting one hour. They will also assign tasks to the candidate, review the completed tasks, and discuss them with the candidate.
  - If there are any changes to the training schedule, such as a cancellation or rescheduling, the Technical Expert/Trainer will inform the candidate promptly. They will be required to complete the training within the given duration.

- The Training Coordinator will take feedback from the candidate twice during the training to ensure that the candidate is satisfied with the training. After the completion of all sessions, the Technical Expert/Trainer will take feedback from the candidate using a Google form.
- Once the training is completed, the candidate should be equipped with the necessary knowledge and skills to perform their job effectively.
- Once the training is completed, the Technical Expert/Trainer will send an email to the sales person and training@Nineztechllc.com to build the candidate's CV.

- RUC
  - Direct Marketing Process:
    - Sales will initiate an email to the CV expert to prepare the resume.
    - The CV expert will share the updated resume with the Training Coordinator, who will then schedule a time for the candidate and Technical Expert to schedule a Resume Understanding Call (RUC) session.
    - The Resume Understanding Session should be completed within 30 minutes. The Technical Expert will share the documentation of the project related to the resume with the candidate after the RUC session is complete.
    - After the RUC is completed, the Technical Expert will take feedback from the candidate using a Google feedback form.
    - If the candidate is satisfied with the RUC, the CV expert will send an email to the marketing team to start the marketing of the candidate. If the candidate is not satisfied, then the RUC will be repeated until the candidate is satisfied.
  - From Training:
    - After training completion, do the same process as above
- JDC
  - Should be completed at least 15 minutes before the scheduled interview time to allow for any necessary adjustments to the candidate's resume.
  - In the event that the Technical Expert is not available at the scheduled interview time/date, the Training Coordinator will ensure that the RUC session is rescheduled to take place before the day of the interview to prevent any delays or scheduling conflicts.
- Interview Support
  - Marketing team initiate an email to Technical Team Lead/Manager to provide support during the interview
  - Team Lead/Manager will schedule interview with expert or inform to schedule interview with external in case of internal support is not available.
  - technical expert should join before the 10 min of an interview
  - first need to complete the JDC and verify the setup in candidate’s pc
  - During the interview if something happened from technical, internal, external or candidates, immediately inform to marketing and tech lead.
  - after completing the interview, send the feedback of interview on same email
  - marketing person is responsible for taking feedback from the candidate and update on same email

    - after 5 rejection, marketing person should take initiative to schedule meeting with the senior level for solution

- Interview Support:
    - The Marketing team will initiate an email to the Technical Team Lead/Manager to request support during the interview process.
    - The Team Lead/Manager will schedule an interview with an expert, or inform the Marketing team to schedule an interview with an external expert in the event that internal support is not available.
    - The technical expert should join the interview at least 10 minutes before the scheduled start time. Before the interview begins, the expert should complete the Job Description Call (JDC) and verify the setup on the candidate's computer.
    - During the interview, if any technical issues or other problems arise from the technical expert, internal staff, external staff, or the candidate, they should immediately inform both the Marketing team and the Technical Team Lead/Manager.
    - After completing the interview, the technical expert should send feedback on the interview to the same email thread.
    - The Marketing person is responsible for taking feedback from the candidate and updating the same email thread.
    - If the candidate has been rejected 5 times, the Marketing person should take the initiative to schedule a meeting with senior-level staff to find a solution.

5 Business Requirements

CRM tool is helping to manage and optimize customer journeys to drive more sales and retain more customers. All the information related to prospects and customers is centrally located for anyone to access. These comprehensive contact profiles can be leveraged to build stronger customer relationships. You can easily track which team member worked on an account previously or view communication history to optimize future interactions.

The requirements in this document are prioritized as follows:

Value	Rating	Description
1	Critical	This requirement is critical to the success of the project. The project will not be possible without this requirement.
2	High	This requirement is high priority, but the project can be implemented at a bare minimum without this requirement.
3	Medium	This requirement is somewhat important, as it provides some value but the project can proceed without it.
4	Low	This is a low priority requirement, or a “nice to have” feature, if time and cost allow it.

5	Future	This requirement is out of scope for this project, and has been included here for a possible future release.

5.1 Functional Requirements

Detailed Functional requirement Document is attached here as Annexure: 2 for your ready reference.

6 Appendices

6.1 FRD