Software Requirements Specification (SRS)

Sales Lead Management System

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Revision History

Version	Date	Description	Author
1.0	<your-date>	Initial Version	Author

1. Introduction

1.1. Purpose

The purpose of this SRS is to provide a comprehensive and detailed specification for the Sales Lead Management System (SLMS), which aims to streamline and enhance the automation of sales processes involved in lead generation. This document serves as a guideline for developers, project managers, and quality assurance teams and acts as a communication bridge between stakeholders, ensuring all parties have a unified understanding of the system's objectives.

1.2. Scope

The Sales Lead Management System (SLMS) outlined in this document is designed to automate various facets of lead generation and management, including the capture of leads, tracking sales activities, and assigning leads to sales personnel based on specific criteria. At this stage, the project scope excludes capabilities related to payment processing or integration with third-party CRM solutions, with a focus on internal processes.

1.3. Definitions, Acronyms, and Abbreviations

- **SLMS**: Sales Lead Management System
- **CRM**: Customer Relationship Management
- **Lead**: A potential sales contact

1.4. References

This document references the following resources:

- Company's current Sales Process Documentation
- Industry Standards for Sales Software as outlined by regulatory bodies
- User Experience Guidelines Document from the marketing team for consistency

1.5. Overview

This document contains the overall description of the SLMS, specific functional and non-functional requirements, interface requirements, and appendices with additional information.

2. Overall Description

2.1. Product Perspective

The SLMS is part of a broader initiative to optimize the organization's sales functions. It operates within the existing company infrastructure and complements current databases without integrating with external CRM software at this stage. The system acts as a standalone tool with capabilities for data extraction and reporting, facilitating real-time lead management.

2.2. Product Functions

The SLMS is designed to perform the following functions:

- **Lead Acquisition**: Collect and centralize data from various channels, including web inquiries, email campaigns, and social media engagements.
- **Lead Management**: Enable tracking and updating of lead information through its lifecycle.
- **Personnel Management**: Provide tools for assigning leads to sales representatives efficiently based on criteria such as geography or product interest.
- **Reporting and Analytics**: Generate insights and performance metrics to help evaluate sales strategies and personnel effectiveness.

2.3. User Characteristics

Users of the SLMS include diverse roles such as:

- **Sales Managers**: Oversee sales pipelines, generate strategic insights, and assess team performance.
- **Sales Representatives**: Manage daily lead interactions and engagements.

- **System Administrators**: Maintain system configurations and user roles, ensuring seamless operation and compliance.

2.4. Constraints

The system must comply with data protection regulations and company privacy policies. It should also operate within current hardware limitations.

2.5. Assumptions and Dependencies

- The system assumes reliable internet access for cloud-based operations.
- Dependence on existing company databases for customer information.

3. Specific Requirements

3.1. Functional Requirements

1. **Lead Capture**:
   - The system should automatically ingest leads from designated platforms and reduce manual entry, facilitating a seamless pipeline of potential customers.

2. **Lead Assignment**:
   - Assign incoming leads to sales staff based on factors like territory, workload, and product expertise to maximize closure potential.

3. **Activity Tracking**:
   - Track all communications related to each lead, including emails and calls, and store this data in an easily retrievable format for transparency and accountability.

4. **Reporting**:
   - Provide customizable reports, allowing managers to drill down into performance data over various time frames and performance metrics, such as conversion rates and engagement statistics.

3.2. Non-Functional Requirements

- **Performance**: Ensure the system can handle up to 1,000 new leads per hour with a latency not exceeding five seconds per operation.

- **Reliability**: Guarantee 99.5% uptime to minimize disruption in sales operations.

- **Usability**: Intuitive interface requiring minimal training, enabling users to perform standard tasks with fewer than three interactions.

3.3. Interface Requirements

User Interfaces

- Provide a dashboard for sales personnel to view their leads and activities.

- Admin panel for configuring lead assignment rules.

Hardware Interfaces

- Must operate on standard office PCs and mobile devices.

Software Interfaces

- Interface with company databases through secure API connections.

- Export data in CSV format for reporting purposes.

Communication Interfaces

- The system shall send email notifications to sales personnel about new lead assignments.

3.4. Performance Requirements

- Must support up to 100 concurrent users without degradation in response time.

3.5. Security Requirements

- Require user authentication with role-based access control.

- Encrypt sensitive data such as lead contact information.

3.6. Other Requirements

- Include comprehensive user manuals and training materials to support onboarding and continuous learning for all user groups.

4. Appendices

Appendix A: Glossary

- **Lead Assignment**: The process of allocating leads to sales personnel.

Appendix B: Analysis Models

- UML Diagrams of lead flow and assignment processes.

Appendix C: Sample Data

- Example CSV format for lead data import/export.