**Business Requirements Document (BRD) for the Proposed System**

**1. Summary**

The detailed specifications for the introduction of a new FreshDesk-based ticketing and customer relationship management (CRM) system are outlined in this Business Requirements Document (BRD). This document aims to gain agreement from stakeholders, provide specific feedback for the project's next stages, and clarify how the suggested solution will satisfy the needs of the client and the company.

**2. Objectives**

The principal objectives of this project are:

1. **Stakeholder Agreement:**
   * Secure alignment and endorsement from all relevant stakeholders on the proposed CRM and ticketing solution.
2. **Project Roadmap:**
   * Provide a detailed framework and guidance for the next phase of the project, encompassing design, development, implementation, and testing.
3. **Customer and Business Needs:**
   * Articulate how the proposed solution will address and fulfil the current and anticipated needs of both customers and the business, thereby enhancing operational efficiency and customer satisfaction.
4. **Operational Efficiency:**
   * Streamline and automate the ticketing process to mitigate manual errors and delays.
5. **Visibility and Accountability:**
   * Enhance real-time visibility and tracking of issue resolution progress, ensuring accountability and transparency.
6. **Customer and Employee Satisfaction:**
   * Ensure timely follow-up and resolution of issues, thus improving overall satisfaction levels.
7. **Data-Driven Decision Making:**
   * Provide comprehensive reporting and analytics capabilities to support continuous improvement and data-driven decision-making.

**3. Background/Business Requirements**

**Current Challenges:**

* **Decentralised Issue Logging:**
  + The existing system lacks a centralised mechanism for logging and tracking customer and employee issues, leading to fragmentation and inefficiencies.
* **Manual Processes:**
  + Current manual dispatching and handling of issues result in frequent errors and delays, negatively impacting response times and resolution efficiency.
* **Visibility and Tracking:**
  + There is no real-time tracking or visibility into the status of issues, making it challenging to monitor progress and hold teams accountable.
* **Inconsistent Follow-Up:**
  + Follow-up procedures are inconsistent, leading to missed follow-ups and unresolved issues, which diminish customer and employee trust and satisfaction.
* **Limited Reporting:**
  + The existing system offers limited reporting and analytics capabilities, hindering the ability to gain insights and drive continuous improvement.

**Proposed Solution:**

* **Centralised System Implementation:**
  + Implement FreshDesk as the centralised CRM and ticketing system to unify and streamline issue management processes.
* **Automation:**
  + Automate the creation and assignment of tickets to appropriate support levels (L1, L2, L3) to reduce manual intervention and enhance efficiency.
* **Real-Time Tracking:**
  + Introduce real-time tracking and monitoring of ticket status to provide visibility into the issue resolution process.
* **Standardised Procedures:**
  + Standardise follow-up procedures to ensure timely and consistent follow-ups, thereby improving accountability and resolution rates.
* **Enhanced Reporting:**
  + Develop comprehensive reporting and analytics capabilities to enable data-driven decision-making and continuous improvement.

**4. Scope**

The scope of this project encompasses the following key areas:

**System Implementation:**

* **Deployment:**
  + Deploy and configure FreshDesk as the centralised CRM and ticketing system.
* **Integration:**
  + Integrate FreshDesk with existing systems to ensure seamless data flow and interoperability.
* **Data Migration:**
  + Migrate data from legacy systems to FreshDesk to preserve historical records and ensure continuity.

**User Management:**

* **Role Creation:**
  + Create and manage user roles and permissions to ensure secure and appropriate access.
* **Training:**
  + Provide comprehensive training for users to facilitate smooth adoption and effective use of the new system.

**Ticketing Process:**

* **Automation:**
  + Automate ticket creation from multiple channels (email, phone, chat) and assignment to appropriate support levels.
* **Tracking:**
  + Implement mechanisms for real-time tracking and monitoring of ticket status.
* **Standardisation:**
  + Standardise follow-up procedures to ensure timely and consistent resolution of issues.

**Reporting and Analytics:**

* **Customised Reports:**
  + Develop customised reports and dashboards to monitor key performance indicators (KPIs) and track progress.
* **Continuous Monitoring:**
  + Continuously monitor and analyse data to identify trends and areas for improvement.

**5. Functional Requirements**

The system must fulfil the following functional requirements to ensure comprehensive and efficient management of customer and employee issues:

**User Management:**

* **User Roles and Permissions:**
  + Ability to create, manage, and assign user roles and permissions to control access and ensure security.
* **Authentication and Access Control:**
  + Support for robust user authentication and access control mechanisms to protect sensitive data.

**Ticket Management:**

* **Automated Ticket Creation:**
  + Automated creation of tickets from various channels (email, phone, chat) to ensure all issues are logged.
* **Automated Assignment:**
  + Automated assignment of tickets to appropriate support levels (L1, L2, L3) based on predefined criteria.
* **Real-Time Tracking:**
  + Real-time tracking and monitoring of ticket status to provide visibility into the resolution process.
* **Detailed Descriptions and Attachments:**
  + Support for detailed descriptions and attachments in tickets to provide comprehensive information for resolution.

**Follow-Up and Resolution:**

* **Standardised Follow-Up Procedures:**
  + Standardised procedures for follow-ups with automated reminders to ensure timely resolution.
* **Resolution Notes and Root Cause Analysis:**
  + Ability to log resolution notes and conduct root cause analysis for continuous improvement.
* **Escalation Management:**
  + Mechanisms for escalation management to handle unresolved issues and ensure timely resolution.

**Reporting and Analytics:**

* **Customisable Reports and Dashboards:**
  + Customisable reports and dashboards to monitor performance and track key metrics (e.g., ticket resolution time, customer satisfaction).
* **Real-Time Analytics:**
  + Real-time analytics for tracking performance and identifying trends.
* **Historical Data Analysis:**
  + Analysis of historical data to identify trends and areas for improvement.

**Integration:**

* **Seamless Data Flow:**
  + Integration with existing systems to ensure seamless data flow and interoperability.
* **Data Migration:**
  + Efficient migration of data from legacy systems to FreshDesk to preserve historical records.

**Compliance and Security:**

* **Data Security:**
  + Ensure data security and compliance with relevant regulations (e.g., GDPR).
* **Regular Audits:**
  + Conduct regular audits and monitoring to ensure compliance and security.

**6. Additional Items**

**Training and Support:**

* **Comprehensive Training:**
  + Provide comprehensive training for all users to ensure effective use of the new system.
* **Ongoing Support:**
  + Offer ongoing support and troubleshooting assistance to address any issues.

**Change Management:**

* **Change Management Plan:**
  + Develop a change management plan to ensure a smooth transition to the new system.
* **Stakeholder Communication:**
  + Communicate changes and benefits to all stakeholders to gain buy-in and support.

**Feedback Mechanism:**

* **User Feedback:**
  + Implement a feedback mechanism for users to report issues and suggest improvements.
* **Regular Reviews:**
  + Regularly review feedback to identify areas for improvement and make necessary adjustments.

**Scalability:**

* **System Scalability:**
  + Ensure the system can scale to accommodate future growth and additional users.
* **Regular Upgrades:**
  + Plan for regular system upgrades and enhancements to keep the system up-to-date.

**Risk Management:**

* **Risk Identification:**
  + Identify potential risks associated with the implementation and operation of the new system.
* **Mitigation Strategies:**
  + Develop mitigation strategies to address identified risks and ensure smooth operation.

**User Experience (UX) Design:**

* **Intuitive Interface:**
  + Focus on designing an intuitive and user-friendly interface to enhance user experience.
* **User Testing:**
  + Conduct user testing to ensure the system meets the needs of its users and is easy to use.

**Performance Metrics:**

* **Key Performance Indicators (KPIs):**
  + Define KPIs to measure the success of the new system and track progress.
* **Regular Reviews:**
  + Regularly review and adjust KPIs as necessary to ensure continuous improvement.

**Budget and Timeline:**

* **Project Budget:**
  + Establish a clear budget for the project and monitor expenses to ensure financial control.
* **Project Timeline:**
  + Develop a detailed timeline for the project and monitor progress to ensure timely completion.

**Personnel Requirements**

This section details the personnel needed for the project, including their roles and responsibilities:

1. **Project Manager**: Responsible for overall project planning, execution, and delivery. Ensures the project stays on schedule and within budget. Acts as the primary point of contact for stakeholders.
2. **Business Analyst**: Gathers and documents business requirements, liaises between stakeholders and the technical team, and ensures that the proposed solution meets business needs.
3. **System Architect**: Designs the architecture of the FreshDesk implementation, ensuring it aligns with business requirements and integrates seamlessly with existing systems.
4. **Developers**: Customise and integrate FreshDesk with existing systems, develop automation scripts, and ensure the functionality aligns with requirements.
5. **Data Migration Specialist**: Handles data migration from legacy systems to FreshDesk, ensuring data integrity and continuity.
6. **Quality Assurance (QA) Testers**: Perform rigorous testing to ensure the system meets all functional and non-functional requirements, including usability, performance, and security.
7. **Training Specialist**: Develops and delivers comprehensive training programmes for end-users, ensuring smooth adoption and effective use of the new system.
8. **Support Staff**: Provide ongoing support and troubleshooting post-implementation to address any issues and ensure continuous smooth operation.

**Cost and Benefit**

This section outlines the detailed costs of the project and the anticipated savings:

**Costs:**

1. **Software Licences**: Cost of FreshDesk licences and any additional software required.
2. **Personnel**: Salaries for project team members (developers, analysts, QA testers, etc.), including any temporary hires or contractors.
3. **Training**: Costs associated with developing and delivering training programmes, including materials and trainers' fees.
4. **Data Migration**: Expenses related to data migration, including tools, software, and personnel.
5. **Integration**: Costs for integrating FreshDesk with existing systems, including any middleware or APIs required.
6. **Hardware**: Any additional hardware required to support the new system, such as servers or upgraded network equipment.
7. **Consultancy Fees**: Fees for external consultants or specialists who provide expertise or additional resources.
8. **Contingency**: Reserve for unforeseen expenses that may arise during the project.

**Benefits:**

1. **Operational Efficiency**: Reduced manual errors and delays, resulting in faster issue resolution and more efficient processes.
2. **Cost Savings**: Lower operational costs due to automation and streamlined processes, including reduced need for manual labour.
3. **Improved Customer Satisfaction**: Timely follow-ups and resolutions enhance customer trust and satisfaction, potentially leading to increased customer retention and loyalty.
4. **Enhanced Reporting**: Better data insights lead to improved decision-making and continuous improvement, enabling more strategic planning and resource allocation.
5. **Increased Accountability**: Real-time tracking and visibility ensure accountability and transparency, fostering a culture of responsibility and trust.
6. **Scalability**: The system can scale with the business, accommodating future growth without significant additional costs, ensuring long-term sustainability.

**Delivery Schedule**

This section provides the phases of the project, final deadlines, and milestones:

**Phases:**

1. **Initiation**: Project kickoff, stakeholder alignment (Month 1).
   * **Deliverables**: Project charter, stakeholder register, initial project plan.
2. **Planning**: Detailed project planning, resource allocation, risk management (Month 2).
   * **Deliverables**: Detailed project plan, risk management plan, communication plan.
3. **Design**: System architecture design, data migration planning (Month 3-4).
   * **Deliverables**: System design documents, data migration strategy, integration plan.
4. **Development**: Customisation, integration, and development of FreshDesk (Month 5-8).
   * **Deliverables**: Customised FreshDesk system, integrated modules, automation scripts.
5. **Testing**: QA testing, user acceptance testing (UAT) (Month 9-10).
   * **Deliverables**: Test plans, test cases, test reports, UAT sign-off.
6. **Deployment**: System deployment, data migration, go-live (Month 11).
   * **Deliverables**: Deployed system, migrated data, go-live checklist, user guides.
7. **Training and Support**: User training, post-implementation support (Month 12).
   * **Deliverables**: Training materials, training sessions, support plan.

**Milestones:**

1. **Project Kickoff**: End of Month 1
2. **Design Approval**: End of Month 4
3. **Development Completion**: End of Month 8
4. **Testing Completion**: End of Month 10
5. **System Go-Live**: End of Month 11
6. **Completion of Training**: End of Month 12

**Glossary of Terms**

This section defines technical terms used in the document to add clarity:

1. **CRM (Customer Relationship Management)**: A technology for managing all your company's relationships and interactions with customers and potential customers.
2. **FreshDesk**: A cloud-based customer support software by Freshworks, used for managing customer inquiries and issues.
3. **L1, L2, L3 Support**: Different levels of support provided to customers, with L1 being the first level of support, L2 the second, and L3 the highest level, typically involving more complex issue resolution.
4. **Automation**: Use of technology to perform tasks without human intervention, aiming to increase efficiency and reduce manual errors.
5. **Data Migration**: The process of transferring data from one system to another, ensuring data integrity and continuity during the transition.
6. **UAT (User Acceptance Testing)**: Testing conducted to ensure that the system meets the business needs and requirements, and is ready for deployment.
7. **QA (Quality Assurance)**: Activities to ensure that the product meets specified requirements and standards, including testing for functionality, performance, and security.
8. **KPIs (Key Performance Indicators)**: Metrics used to evaluate the success of an organisation or activity, typically tied to strategic goals and objectives.