**XLead**

# Business Requirements Document (BRD)

Date: 10-04-2025


**PREPARED BY:**

Sagar S Abraham – Team Lead

Meera M – Scrum Master

Abhiram M Prasad

Dhanya P

Bhagya Unnikrishnan

Harinand S

# Table of Content

# 1. Project Overview

**Project Name:** XLead

**Project Manager:**

**Project Sponsor:** Experion Technologies

**Date:**

# 2. Purpose of the Document

This document serves three key purposes:

## 2.1 Overview

XLead aims to simplify customer relationship and deal management by centralizing data. It supports features like customer and deal tracking, BO stage updates, document attachments, and real-time dashboards to ensure efficient and effective CRM operations.

## 2.2 Guidance

A structured roadmap will guide the development team through clear phases, ensuring alignment with business goals. It will outline detailed business and functional requirements for smooth execution, while also addressing non-functional aspects like performance, scalability, and security, along with data handling and system constraints.

## 2.3 Reference

The project plan serves as a communication tool to align stakeholder expectations, ensuring everyone is on the same page. It establishes a shared understanding of project goals and execution strategies and acts as a foundational reference to maintain consistency throughout development and implementation.

# 3. Problem Statement

The existing deal management process is largely manual, involving the uploading of deal PDFs to designated drive folders and granting access to relevant team members. This method is inefficient, time-consuming, and prone to errors. The lack of automation affects workflow efficiency, reduces accuracy, and slows down deal execution. As a result, there is a need for a centralized system that improves deal tracking, collaboration, and management efficiency.

## 4. Project Objective

XLead helps businesses track sales opportunities from start to finish with a simple dashboard that shows where each deal stands. Team members can easily create new deals, see customer information, and follow what steps have been taken, with different permission levels for different roles. The system keeps everyone on the same page while providing useful insights about sales progress.

## 5. Scope Definition

### 5.1 In-Scope

- Deal creation, modification, approval, and tracking for new and existing opportunities
- Sales pipeline management with stage categorization and progress tracking
- Privilege-based access control for secure and authorized deal handling
- Timeline visualization for active deals and historical tracking
- Analytics for deal performance and sales progress
- Dashboard to view and manage deals in a centralized interface
- Document management for deal-related files
- Contact management and association with deals
- Export functionality for data management
- Mobile-responsive design for access across devices

### 5.2 Out-of-Scope

- Probability tracking
- Real-time collaboration tools for Business Opportunity Owners, Managers, and Sales Teams
- Alerts and notifications regarding stage changes, deal closures etc.
- Financial accounting and invoicing functionalities
- AI integration for automated verification of documents
- Report Generation

# 6. Stakeholders

## Primary Stakeholders

### *Business Opportunist Owner (BOO)*

- **Role:** Holds an overview on the deals handled by the BOs under them, ensuring that only high probability deals proceed through the pipeline.
- **Interests:** Maintaining CRM system security, ensuring accurate qualification of prospecting customers, and optimizing deal closure efficiency.

### *Business Opportunist (BO)*

- **Role:** Responsible for adding and managing new deals, identifying opportunities for business growth, and ensuring structured deal execution.
- **Interests:** Enhancing deal accessibility for assigned users, streamlining deal management workflows, and improving efficiency.

# 7. Business Requirements

## 7.1 Dashboard & Analytics Module

| Requirement ID | Role(s) | Feature | Description | Priority | Data Source |
|---|---|---|---|---|---|
| **RQ-001** | BO & BOO | Dashboard with Deal Analytics | Provides overview statistics of assigned deals | High | CRM Database |

## 7.2 Deal Management Module

| Requirement ID | Role(s) | Feature | Description | Priority | Data Source |
|---|---|---|---|---|---|
| **RQ-002** | BO | Add CRM Deal Information | Adding deal information to the pipeline | High | CRM Database |

| | | | | | |
|---|---|---|---|---|---|
| **RQ-003** | BO | Deal Management & Pipeline Tracking | Enables users to update, filter, and track deals efficiently across different pipeline stages | High | CRM Database |

## 7.3 Company Management Module

| Requirement ID | Role(s) | Feature | Description | Priority | Data Source |
|---|---|---|---|---|---|
| **RQ-004** | BO & BOO | View Companies details | Improves visibility into companies associated with deals, enabling tracking and management | High | CRM Database |
| **RQ-005** | BO & BOO | Filter Company Details | Makes things more efficient by letting BOs focus on certain groups of companies, while BOOs can keep an eye on how the work is spread out. | High | CRM Database, Date-Tracking Functions |

## 7.4 Contact Management Module

| Requirement ID | Role(s) | Feature | Description | Priority | Data Source |
|---|---|---|---|---|---|
| **RQ-006** | BO & BOO | View Contact Details in Dashboard with filters | Provides a detailed and interactive view of contact information | High | CRM Database |

### 7.5 Data Management Module

| Requirement ID | Role(s) | Feature | Description | Priority | Data Source |
|---|---|---|---|---|---|
| **RQ-007** | BO & BOO | Report and Data Export | Allows easy sharing of reports in Excel/CSV format for analysis and record-keeping. | High | CRM Database |

### 7.6 Document Management Module

| Requirement ID | Role(s) | Feature | Description | Priority | Data Source |
|---|---|---|---|---|---|
| **RQ-008** | BO | Document Management | Provides storage and management of deal-related documents | High | Document Storage System |

### 7.7 Mobile Responsiveness Module

| Requirement ID | Role(s) | Feature | Description | Priority | Data Source |
|---|---|---|---|---|---|
| **RQ-009** | BO & BOO | Mobile Responsive Interface | Allows access to the CRM system from mobile device with optimal viewing and interaction experience | High | CRM System |

# 8. Functional Requirements

### 8.1. Function: FN-CRM-01 - Deal Analytics Dashboard

- **Associated BR ID**: RQ-001
- **Function Description**: Offers a detailed view of the deal pipeline through an interactive dashboard.

- **Acceptance Criteria**:
  - Dashboard displays deals categorized by stage.
  - Supports filtering by region, account, and customer.
  - Provides real-time updates to the pipeline view.
  - Includes visual charts for deal pipeline and progress tracking.
- **Functional Dependencies**: Integration with Database.

### 8.2. Function: FN-CRM-02 - Deal Information Entry

- **Associated BR ID**: RQ-002
- **Function Description**: Enables BO to input and manage deal details for customers.
- **Acceptance Criteria**:
  - BO can create deals with mandatory fields (e.g., Customer, Value, Contact).
  - Supports addition of custom fields with specified data types (text, date Time, Number, decimal values, Boolean, string).
  - Validates required fields and checks for duplicates.
- **Functional Dependencies**: Integration with CRM Database.

### 8.3. Function: FN-CRM-03 - Deal Management and Tracking

- **Associated BR ID**: RQ-003
- **Function Description**: Supports adding, updating, and tracking deals across pipeline stages.
- **Acceptance Criteria**:
  - BO can create and update deals with required fields.
  - Tracks changes with timestamps and user info.
  - Provides deal history for audits.
- **Functional Dependencies**: Integration with CRM Database.

### 8.4. Function: FN-CRM-04 - Pipeline Stage Updates

- **Associated BR ID**: RQ-003
- **Function Description**: Manages deal progression through pipeline stages.
- **Acceptance Criteria**:
  - BO can update deal stages.
  - Tracks transitions with timestamps.
  - Requires completion of fields for stage advancement.
- **Functional Dependencies**: Integration with CRM Database and BO Stage Data.

### 8.5. Function: FN-CRM-05 - Filtered Deal Management

- **Associated BR ID**: RQ-003
- **Function Description**: Enables filtering and exporting of deal data.
- **Acceptance Criteria**:
  - Supports filtering by stage, value, and date.
  - Displays results in customizable formats.
  - Allows saving filters and exporting filtered sets.
- **Functional Dependencies**: Integration with CRM Database.

### 8.6. Function: FN-CRM-06 - Company Overview on Dashboard

- **Associated BR ID**: RQ-004
- **Function Description**: Displays a list of companies linked to deals on the dashboard.
- **Acceptance Criteria**:
  - Dashboard section shows company names with columns: Company Name, Company Website, and Company Phone Number.
  - List updates dynamically upon dashboard load or refresh.
- **Functional Dependencies**: Integration with CRM Database.

### 8.7. Function: FN-CRM-07 - Company Metrics Display

- **Associated BR ID**: RQ-004
- **Function Description**: Shows key metrics of companies and pipeline statuses on the BO dashboard.
- **Acceptance Criteria**:
  - Displays tiles for total company count, open pipelines, and won pipelines.
  - Updates counts in real-time or on refresh based on deal status changes.
- **Functional Dependencies**: Integration with CRM Database and BO stage data.

### 8.8. Function: FN-CRM-08 - Company Details Filtering

- **Associated BR ID**: RQ-005
- **Function Description**: Allows filtering of company details for focused management.
- **Acceptance Criteria**:
  - Offers filters: "New Companies Last Week," "All Companies," "New Companies This Week."

    - "New Companies Last Week" shows companies added in the last 7 days.
    - "All Companies" lists all companies tied to BO deals.
    - "New Companies This Week" includes companies added this week.
    - Displays filtered results with Company Name, Company Website, and Company Phone Number.
- **Functional Dependencies**: Integration with CRM Database and Date-Tracking Functions.

### 8.9. Function: FN-CRM-09 - Company Assignment Overview

- **Associated BR ID**: RQ-005
- **Function Description**: Provides BOO with visibility into company assignments per BO.
- **Acceptance Criteria**:
    - BOO dashboard lists companies with leads assigned to each BO.
    - Includes columns: Company Name, Company Website, Company Phone Number, and assigned BO.
    - Supports grouping or sorting by BO for oversight.
- **Functional Dependencies**: Integration with CRM Database.

### 8.10. Function: FN-CRM-10 - Total Company Count for BOO

- **Associated BR ID**: RQ-005
- **Function Description**: Displays the total number of companies across all BOs for BOO.
- **Acceptance Criteria**:
    - BOO dashboard shows a tile with the total count of companies.
    - Count updates dynamically with changes in BO deal pipelines.
- **Functional Dependencies**: Integration with CRM Database.

### 8.11. Function: FN-CRM-11 - Contact Details Display

- **Associated BR ID**: RQ-006
- **Function Description**: Provides an interactive view of contact information on the dashboard.
- **Acceptance Criteria**:
    - Displays contact details (name, company, email, phone) with a quick preview option.
    - Shows additional info like description and notes.

- **Functional Dependencies**: Integration with CRM Database.

### 8.12. Function: FN-CRM-12 – Filtered and Custom Contact Views

- **Associated BR ID**: RQ-006
- **Function Description**: Lets users easily view and organize contact details the way they want on the dashboard.
- **Acceptance Criteria**:
  - Displays contact details based on filters.
  - Supports grouping or sorting by BO.
  - Users can create their own custom views, like lists or spreadsheets, with chosen details (like Company Name or Contact Owner).
- **Functional Dependencies**: Integration with CRM Database.

### 8.13. Function: FN-CRM-13 - CSV Export of Company Data

- **Associated BR ID**: RQ-007
- **Function Description**: Enables exporting company details for external analysis.
- **Acceptance Criteria**:
  - Includes an "Export to CSV" button on the company page.
  - Exports columns: Company Name, Company Website, Company Phone Number, and (for BOO) assigned BO.
  - Reflects current view (e.g., filtered results) in the CSV.
  - Downloads file in a structured format.
- **Functional Dependencies**: Integration with CRM Database and Data Export Function.

### 8.14. Function: FN-CRM-14 - CSV Export of Contact Data

- **Associated BR ID**: RQ-007
- **Function Description**: Enables exporting contact details for external analysis.
- **Acceptance Criteria**:
  - Includes an "Export to CSV" button on the company page.
  - Exports columns: Contact Name, Company Name, Phone Number, Email and Contact Owner.
  - Reflects current view (e.g., filtered results) in the CSV.
  - Downloads file in a structured format.
- **Functional Dependencies**: Integration with CRM Database and Data Export Function.

### 8.15. Function: FN-CRM-15 - Document Handling

- **Associated BR ID**: RQ-008
- **Function Description**: Manages storage and retrieval of deal-related documents.
- **Acceptance Criteria**:
    - Users can upload and attach files (.pdf, .docx, .xls).
    - Supports downloading attached documents.
    - Allows secure deletion of attachments.
- **Functional Dependencies**: Document Storage System with size restrictions and security.

### 8.16. Function: FN-CRM-16 - Mobile Responsive Web Application

- **Associated BR ID**: RQ-009
- **Function Description**: Ensures the entire CRM web application is fully functional and optimized for viewing on mobile devices.
- **Acceptance Criteria**:
    - All pages (Dashboard, Pipeline, Contact, and Company) adapt automatically to mobile screen sizes.
    - Navigation menu transforms into a toggle menu on smaller screens.
    - Interactive elements (buttons, filters, dropdowns) resize appropriately for touch interaction.
    - Charts, graphs and visual elements scale properly for mobile viewing.
    - Export function remain accessible on mobile devices.
    - The web application should look and feel the same across all mobile devices, maintaining a consistent design and branding.
- **Functional Dependencies**: Depends on responsive design tools, access to CRM data, and layout systems that adjust to different mobile devices.

## 9. Non-Functional Requirements

- **Performance:** System response time < 5 seconds for key operations, Support 500+ concurrent users
- **Security:** Role-based access control, Data encryption for sensitive information, Audit trails for all deal modifications
- **Usability:** Intuitive interface requiring minimal training, Consistent experience across desktop and mobile

# 10. Data Requirements

### Data Element:

### Deal Information

- **Description:** Details of all deals, including deal name, customer, value, stage, custom fields as defined by users, and stage history.
- **Source:** Structured data containing deal records.
- **Format:** Structured format, either as a database or spreadsheet.
- **Dependencies:** CRM database for deal records and stage history.

### Company Information

- **Description:** Information about companies, including company name, industry vertical, website, and phone number.
- **Source:** Structured data containing company details.
- **Format:** Structured format, either as a database or spreadsheet.
- **Dependencies:** CRM database for company records.

### Contact Information

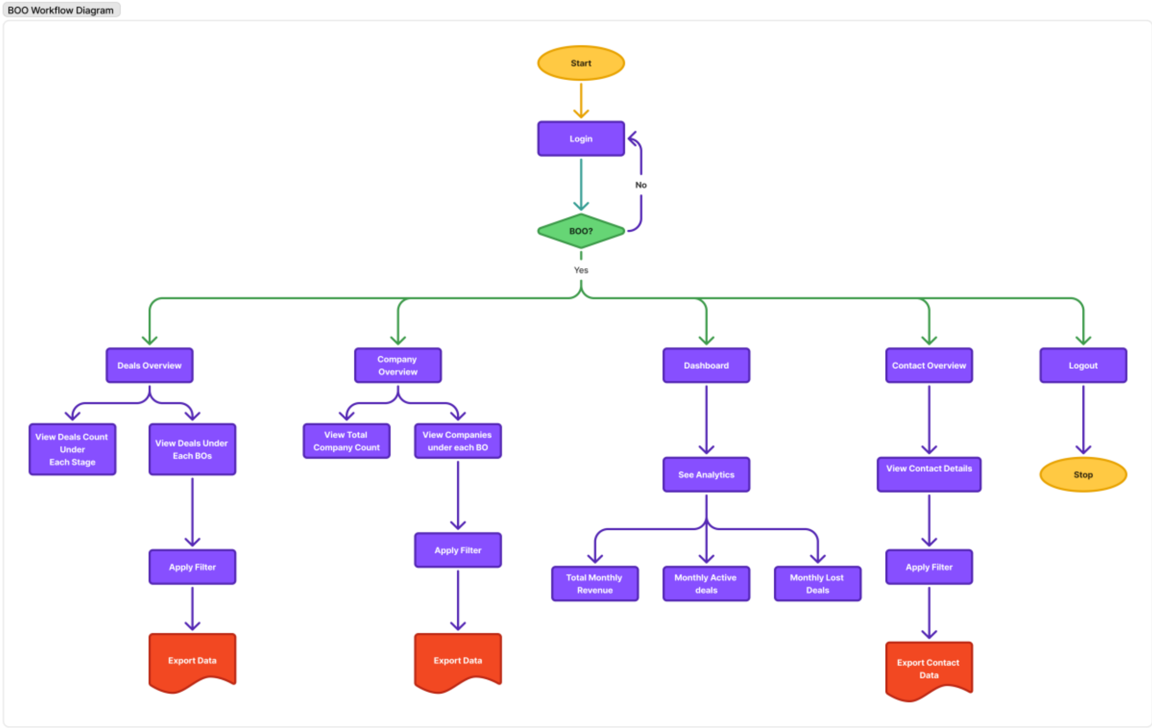
- **Description:** Details of contacts, including name, designation, email, phone number, and associated company name.
- **Source:** Structured data containing contact details.
- **Format:** Structured format, either as a database or spreadsheet.
- **Dependencies:** CRM database for contact management.

### Customer Information

- **Description:** Information about customers, including associated company details, contact details, and customer status (Suspect, Prospect, Customer).
- **Source:** Structured data containing customer records.
- **Format:** Structured format, either as a database or spreadsheet.
- **Dependencies:** CRM database for customer tracking and status updates.

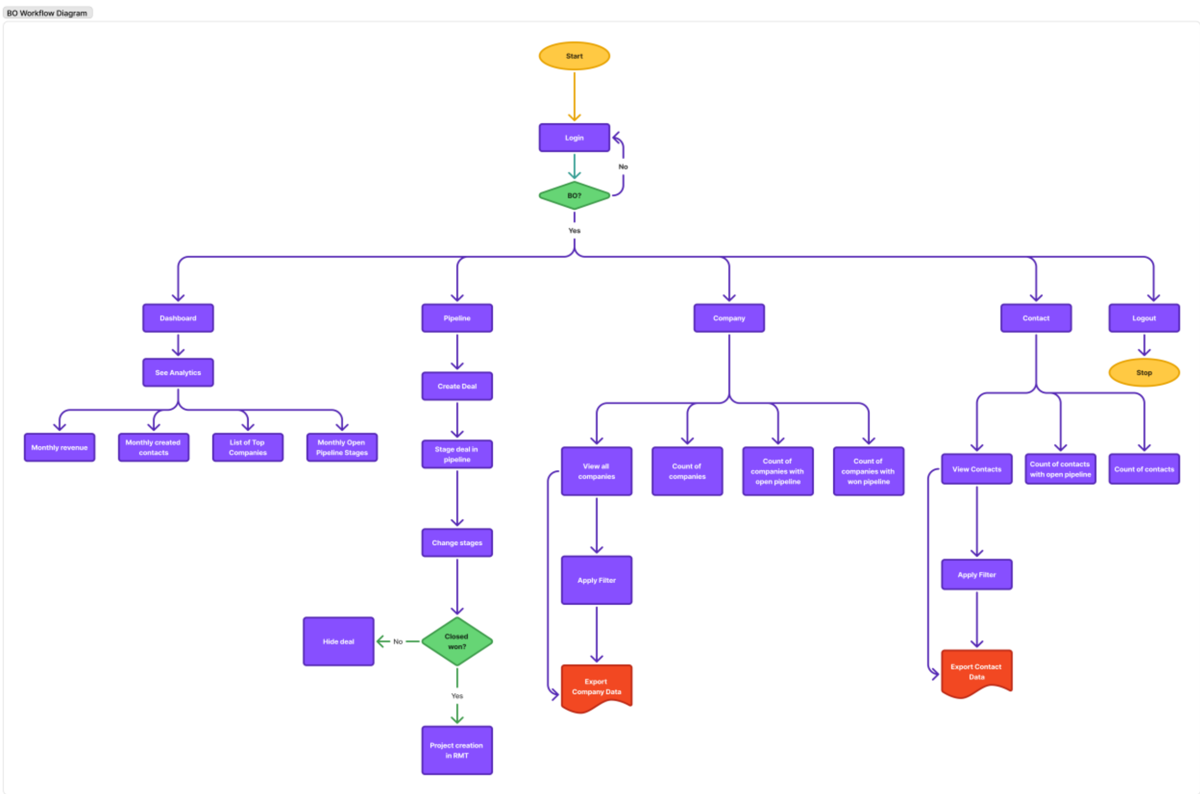
# 11. Workflow

#### BOO User Flow:



BOO Workflow Diagram
Start
Login
No
BOO?
Yes
Deals Overview
View Deals Count Under Each Stage
View Deals Under Each BOs
Apply Filter
Export Data
Company Overview
View Total Company Count
View Companies under each BO
Apply Filter
Export Data
Dashboard
See Analytics
Total Monthly Revenue
Monthly Active deals
Monthly Lost Deals
Contact Overview
View Contact Details
Apply Filter
Export Contact Data
Logout
Stop


## BO User Flow:



BO Workflow Diagram
Start
Login
No
BO?
Yes
Dashboard
See Analytics
Monthly revenue
Monthly created contacts
List of Top Companies
Monthly Open Pipeline Stages
Pipeline
Create Deal
Stage deal in pipeline
Change stages
Closed won?
No
Hide deal
Yes
Project creation in RMT
Company
View all companies
Count of companies
Count of companies with open pipeline
Count of companies with won pipeline
Apply Filter
Export Company Data
Contact
View Contacts
Count of contacts with open pipeline
Count of contacts
Apply Filter
Export Contact Data
Logout
Stop

# 12. Constraints and Assumptions

## 12.1 Constraints

- Must integrate with existing login environment

## 12.2 Assumptions

- Sales teams will adopt new digital processes
- Mobile access is critical for field operations

# 13. Risk Analysis

| Risk | Mitigation Strategy |
|---|---|
| User resistance to change | Comprehensive training program and intuitive UX design |
| Technical integration challenges | Early prototyping and testing with existing systems |
| Data migration complexities | Phased implementation approach with data validation |
| Performance issues with large data sets | Performance testing and optimization before launch |
| Security vulnerabilities | Regular security audits and adherence to security standards |

# 14. Sign-off and Risk Approval

| Name | Job Title | Role | Date | Sign-Off |
|---|---|---|---|---|
| Sreelekshmi G | Technology Lead | Mentor | 09/04/2025 | Discussed |
| Pratheesh Kumar | AGM - Internal Systems | POC | 09/04/2025 | |
| Subhash K Joseph | Consultant | POC | 09/04/2025 | |

# 15. Appendix

## 15.1 Glossary

- **BO**: Business Opportunists
- **BOO**: Business Opportunity Owner
- **CRM**: Customer Relationship Management

## 15.2 Related Documents

- User Requirements Document
- System Architecture Document
- Database Architecture Document
- Project Plan