Business Requirements Document

CUSTOMER RELATIONSHIP MANAGEMENT SYSTEM

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1 Executive Summary

When a business enters a growth phase, it can be easy for valuable leads to fall through the cracks — after all, friction is a natural result of business growth.

In addition, cross-team alignment, which companies struggle with, is also integral to the success of the business. This alignment — specifically, the workflow continuity from marketing to sales — helps the team streamline all stages of the buyer's journey.

In doing so, internal teams can share critical data and customer information so they can work as a cohesive unit. As a result, customers will have a seamless and consistent end-to-end customer experience that makes them want to remain loyal to the brand [1]

This project aims to build a customer relationship management system to integrate different features which include, but is not limited to, contact management, customer or prospect interaction tracking, lead generation and assignment, sales pipeline management, etc. which marketing/sales employees can use to increase productivity, prevent missed revenue opportunity, and others.

There are a number of requirements this project is looking to satisfy, including user management, role management, leads assignment, user dashboard, prospect management, an appointment system, engagement record management, and many more. A number of stakeholders are involved in the selection of the system, including the development team, .Net Bootcamp trainer, Collabera CES, and PJLI; and for the implementation of this system, the development team.[2]

The aim is to have the working version of the system launched at the start of the second quarter and will test and evaluate the systems, and implement the system on schedule as specified in the Appendix.

This document is used as a starting point for solution design. It details the needs, objectives, scope, requirements, schedule, functional and non-functional requirements, an overview of the current process, as well as the proposed process once the solution is implemented.

2 Project Description

The proposed solution is a Customer Relationship Management System (CRMS) for sales/marketing employees of MicroInsurance products. It consists mainly of two types of services - an MVC application and REST Web APIs. The MVC application is the CRMS app that Admins/Users access directly. REST Web APIs will run in the background as microservices. These microservices will fetch all product information and non-microinsurance customers list thru API HTTP request/response. The CRMS MVC App will only consume these APIs thru HTTP GET

Requests ONLY. Another microservice will be developed to have access to the MicroInsurance Customer database with complete CRUD implementation

The primary goal of this project is to roll out a 100% complete, fully functional CRMS .NET MVC Web application and microservices developed thru .Net Web API on or before April 14, 2023. The targeted users are employees of the sales/marketing department.

In order for it to be considered fully functional, the following features should be developed and included:

1. ADMIN
   - Login/Logout
   - Manage Users
   - Manage Roles
   - Manage Dropdown Options
   - Lead Assignment
2. USER
   - Login/Logout
   - Dashboard
   - Manage Prospect
   - Manage Leads
   - Manage Engagement
   - Manage Appointment
3. API Integration

The goal of deploying a fully functional CRMS presents these challenges:

1. Due to time constraints, a limited number of features will have to be implemented.
2. Extensive testing period cannot be accommodated.
3. API only uses seed data

The development schedule can be found in the Appendix section of this document.

By undertaking this project, the development team will ensure that goals are met, namely those of increasing employee productivity and enhancing customer relationships and sales experience.[3]

3 Project Scope

3.1 In Scope

The following areas are in the scope for this project:

3.1.1 Web Services

PRODUCTS

- Login/Logout
    - Identity JWT enabled

- Manage Products
    - List Products ONLY

CEBUANA_CUSTOMERS

- Login/Logout
    - Identity JWT enabled

- Manage Customers
    - Create Customers
    - Update Customers
    - Delete/Disable(soft) Customers
    - List Customers

INSURANCE_CUSTOMERS

- Login/Logout
    - Identity JWT enabled

- Manage InsuranceCustomers
    - Create InsuranceCustomers
    - Update InsuranceCustomers
    - Delete/Disable(soft) InsuranceCustomers
    - List InsuranceCustomers

3.1.2 Web Application

ADMIN

- Login/Logout
    - Profile
    - Email verification
    - Change password

- Manage Roles

- Manage Users
- Manage Dropdown Options
    - Appointment - Purpose CRUD
    - Engagement - EngagementType CRUD
    - Engagement - Effectivity CRUD
    - Engagement - CommunicationsMethod CRUD
    - Leads - LeadStatus CRUD
    - Leads - LeadSource CRUD
- Leads Assignment

USER

- Login/Logout
- Dashboard
- Manage Prospect
- Manage Leads
- Manage Engagement Records
- Manage Appointments

3.2 Out of Scope

The following areas are out of scope for this project and are suggested for future enhancements:

- Automated Communication to Prospect/Customer [Twilio(Text), Email]
- Manager Profile, Dashboard
- Google/Outlook Calendar Integration
- Sales App Integration
- Roles: Sales, Marketing, Sales+Marketing
- Business Intelligence reporting
- Mobile App Support
- Data Visualization
- Customer Service and Ticket/Case Management

4 Current Process

In the current process, a sales/marketing employee can use excel or paper to create and track their prospect/customer list which leads to inefficiency and pain in a customer's sales journey. Additionally, this manual data storage and manual tracking of prospects/customers utilize more time and resources and is prone to the loss of important information about prospects/customers and products.

The proposed solution is a customer relationship management system that aims to solve these issues by consolidating all the necessary steps and data into a single system to help salespeople better maintain customer/prospect information, convert them to leads, track leads interaction, streamline and manage the sales pipelines from marketing to sales, and give potential customers a better overall sales experience.

5 Functional Requirements

5.1 Priority

The requirements in this document are divided into the following categories:

CRMS Web Application

Item	Rating	Description
Login/Logout	High	AdminUser will be able to login with his/her provisioned login credentials. No Signup option as credentials are generated by the admin using employee details
ADMIN - Users CRUD	High	Allows the admin to do CRUD operations for Users. This includes login credential creation for users and role assignment (Admin, Manager, Sales)
ADMIN - Roles CRUD	High	Allows the admin to do CRUD operations for Roles.
ADMIN - Dropdown Options CRUD	High	Allows the admin to do CRUD operations for the following dropdown options in the app: - Appointment - Purpose CRUD - Engagement - EngagementType CRUD - Engagement - Effectivity CRUD - Engagement - CommunicationsMethod CRUD - Leads - LeadStatus CRUD - Leads - LeadSource CRUD

ADMIN - Leads Assignment	High	Allows the Admin to see a filtered list of non-microinsurance customers thru API with a threshold based the total transaction amount for. a specific period of time, and assign that prospect to an employee
ADMIN/USER - Profile	High	View/Edit Admin/User profile
USER - Dashboard	High	View information summary including total prospects, total approaches, and total sales. View a list of prospects manually generated by the user or company-generated. View a list of Todo/Follow-up Activities with prospects. Includes buttons to create engagement, appointment, convert to a lead, or update a lead
USER - Prospect CRUD	High	Allows the USER to do CRUD operations for potential prospects.
USER - Leads CRUD	High	Allows the USER to do CRUD operations for Leads. Includes the following information: creation date/time, prospect information, lead status, lead source, and products offered.
USER - Engagement Record CRUD	High	Allows the USER to do CRUD operations for Engagement Records. Includes the following information: creation date/time, prospect information, topic, description, engagement type, engagement effectivity, and communication method
USER - Appointments CRUD	High	Allows the USER to do CRUD operations for Appointments. Includes the following information: creation date/time, prospect information, appointment status, appointment description, and purpose.

Rest API CRMS Application

Item	Rating	Description
JWT Authorization	High	Security Feature for API access
Access PRODUCTS to perform READ operations	High	APIs to access the PRODUCTS LIST and perform READ operation to populate Products dropdown list
Access Customers to perform READ operations	High	APIs for DB access of non-microinsurance customers and perform READ operation to populate Existing Customers List in Leads Assignment

Non-Functional Requirements

Item	Rating	Description
External 3rd party Application API	Low	Allow CRMS application to expose API's specific to 3rd party tools to consume and list MicroInsurance Customer details

6 Glossary

This section explains all of the terms and abbreviations that were used in this document, for those who are unfamiliar with them. Not everybody who reads this document will understand all of the terms, so this section is helpful.

Term	**Explanation**

7 References

This section contains links to all other places that were referred to in this document. These may include:

- *Documents on shared document control systems (such as SharePoint)*
- *Web sites*
- *URLs or network locations*

#	Link
1	The Importance of a CRM: Why Your Company Needs a CRM to Grow Better [New Data] (hubspot.com)
2	Business Requirements Document Template & Guide | Wrike
3	*IC-Sample-Business-Requirements-Document-Template-11238_PDF.pdf (smartsheet.com)

8 Appendix

This section may include any other information that does not fit in the document above. This may include:

- *Details of the processes*
- *Analysis of existing process and benefits for the Business Drivers section.*
- *Any other information you might need*

Beware of overloading this document with information. Preferably, any extra documents should be created separately and linked to, rather than embedding, as it is better for file sizes and version control.

9 Document History

This section details the history of the document at each version. It's good to know what has changed in each version, by who, and when it happened.

Version	Date	Changes	Author
0.1	03/29/2023	COMPLETED FIRST DRAFT	LEGISTA
0.3			
0.4			
0.5			