



CAPSTONE PROJECT

Customer Relationship Management (CRM) Software system "NextGen CRM,"

Is intended to help Businesses streamline with their **Customer interactions**, **Manage Sales pipelines**, and **improve data-driven decision-making**.

The project involves creating a comprehensive, **User-friendly CRM platform** that **integrates** with popular **business tools**, **uses AI for predictive analytics**, and **ensures high scalability**.

Project Statement: -

Project Scope and Objectives:

- **Objective:** **Develop a CRM system called "NextGen CRM" for mid-sized enterprises.**
 - A mid-sized company like "**Tech Nova Solutions** " (A fictional company) required a CRM to manage its 500+ customers, track sales leads, and analyse customer data to improve decision-making & Successful system.
 - The CRM are integrated with tools like **Salesforce**, **HubSpot**, and **Microsoft Teams**.
 - Having AI to predict customer behaviour, such as identifying which leads are most likely to convert into sales.
- **Key Statements:**
 - a) Resource Allocation
 - b) Budget.
 - c) Timelines.
 - d) Scope Creep.
- **Key Deliverables:**
 - a) WBS & Budgeting with structured employment & Other Sources
 - b) Allocation Plan & Risk Management Plan.
 - c) Quality Management Plan
 - d) Agile Scrum Sprints
 - e) Vendor & Contract Management.
 - f) Project Closer Plan.
 - g) Assumptions and Constraints.
 - h) Appendix
 - i) Conclusion

Work Breakdown Structure (WBS)

- **WBS for NextGen CRM:**

- 1. Project Initiation (2 weeks):**

- Define project scope: "NextGen CRM will help mid-sized companies manage customer interactions and sales pipelines."
- Identify stakeholders: CEO, CTO, Sales Team, and end-users.
- Create a project charter: Document the project objectives, timeline, and budget.

- 2. Planning (3 weeks):**

- Develop a project management plan: Include timelines, resource allocation, and risk management.
- Create a budget: Allocate Rs50 lakh as described earlier.
- Develop a risk management plan: Identify risks like "delays in AI integration" and plan mitigation strategies.

- 3. Execution (10 weeks):**

- **Develop core CRM features:**
 - Customer Interaction Management: Build a dashboard where users can view and manage customer interactions.
 - Sales Pipeline Management: Create a feature to track sales leads from initial contact to closing the deal.
 - AI Predictive Analytics: Integrate AI to analyze customer data and predict which leads are most likely to convert.

- 4. Monitoring & Controlling (4 weeks):**

- Track progress using Agile Scrum Sprints.
- Manage risks: If the AI integration is delayed, allocate more resources to that task.
- Ensure quality: Conduct automated testing and user acceptance testing (UAT).

- 5. Closing (2 weeks):**

- Prepare the final report: Summarize the project, including challenges faced and how they were resolved.
- Hand over the CRM system to stakeholders.
- Conduct a project review: Discuss what went well and what could be improved for future projects.

Key Statements

a) Resource Allocation:

Resource Allocation Team		
S.No.	Designation	Key Result Areas
1	Project Manager	Oversees the project and ensure on timely delivery.
2	Business Analyst	Defines requirements and liaises with stakeholders
3	CRM Development- Manager	Develop the CRM system
4	CRM Developer-2	Develop the CRM system
5	CRM Developer-3	Develop the CRM system
6	CRM Developer-4	Develop the CRM system
7	CRM Developer-5	Develop the CRM system
8	AI Specialist	Implementation of AI for predictive analytics
9	Tester-Manager	Responsible for Testing and quality assurance
10	Tester-2	Responsible for Testing and quality assurance
11	Finance Manager	Manage budget and resource allocation

b) Budget:

Budget Allocation					
Descriptions	Budget	50,00,000		Timeline	4-6 Months
Descriptions	Month-1	Month-2	Month-3	Month-4	Month-5
Development Team Salaries	3,50,000	3,50,000	3,50,000	3,50,000	3,50,000
Software Licenses & Tools	2,50,000	2,50,000	2,50,000	2,50,000	2,50,000
Cloud Hosting & Security	1,00,000	1,00,000	1,00,000	1,00,000	1,00,000
Testing & QA	1,00,000	1,00,000	1,00,000	1,00,000	1,00,000
Training & Deployment	50,000	50,000	50,000	50,000	50,000
Contingency	75,000	75,000	75,000	75,000	75,000
Management Contingency	75,000	75,000	75,000	75,000	75,000
Total	10,00,000	10,00,000	10,00,000	10,00,000	10,00,000

c) Timeline:

Schedule Management Plan 4-6 months (01-Nov-2023 to 27-Mar-2024).		
S.No.	Details	Deadlines
1	Project Initiation	14th Nov 2024
2	Planning	5th Dec 2024
3	Execution	13th Feb 2025
4	Testing & QA	13th March 2025
5	Project Closer	27th March 2025

d) Scope Creep:

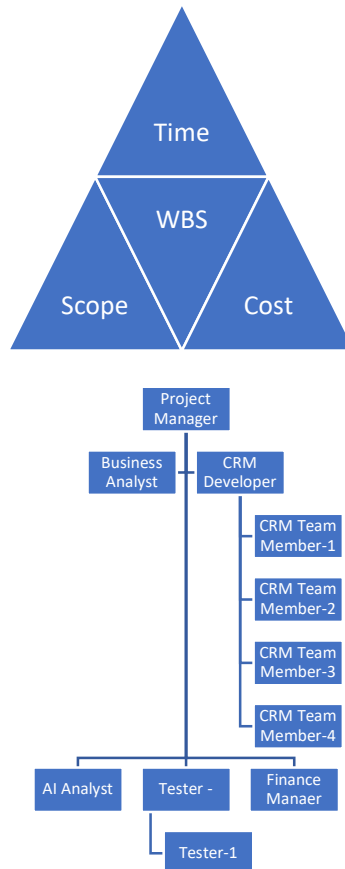
- a. Additional features proposed by Stakeholders request (i.e. Mobile app for the CRM).

b. Change Control Process:

- i. Documentation for new request.
- ii. Impact evaluation as additional timeline and budget.
- iii. Approval from stakeholders as a additional feature.

Key Deliverables

a) WBS & Budgeting with Structured Employment & Other Sources



Budget Allocation					
Descriptions	Budget	<u>50,00,000</u>		Timeline	<u>4-6 Months</u>
Descriptions	Month-1	Month-2	Month-3	Month-4	Month-5
Development Team Salaries	3,50,000	3,50,000	3,50,000	3,50,000	3,50,000
Software Licenses & Tools	2,50,000	2,50,000	2,50,000	2,50,000	2,50,000
Cloud Hosting & Security	1,00,000	1,00,000	1,00,000	1,00,000	1,00,000
Testing & QA	1,00,000	1,00,000	1,00,000	1,00,000	1,00,000
Training & Deployment	50,000	50,000	50,000	50,000	50,000
Contingency	75,000	75,000	75,000	75,000	75,000
Management Contingency	75,000	75,000	75,000	75,000	75,000
Total	10,00,000	10,00,000	10,00,000	10,00,000	10,00,000

Designation/ Salary Breakup	Month-1	Month-2	Month-3	Month-4	Month-5	Day Salary
Project Manager	60,000	60,000	60,000	60,000	60,000	2,000
Business Analyst	25,000	25,000	25,000	25,000	25,000	833
CRM Development-Manager	35,000	35,000	35,000	35,000	35,000	1,167
CRM Developer-2	25,000	25,000	25,000	25,000	25,000	833
CRM Developer-3	25,000	25,000	25,000	25,000	25,000	833
CRM Developer-4	25,000	25,000	25,000	25,000	25,000	833
CRM Developer-5	25,000	25,000	25,000	25,000	25,000	833
AI Specialist	35,000	35,000	35,000	35,000	35,000	1,167
Tester-Manager	35,000	35,000	35,000	35,000	35,000	1,167
Tester-2	25,000	25,000	25,000	25,000	25,000	833
Finance Manager	35,000	35,000	35,000	35,000	35,000	1,167
Total	3,50,000	3,50,000	3,50,000	3,50,000	3,50,000	11,667

Timeline:

Schedule Management Plan 4-6 months (01-Nov-2023 to 27-Mar-2024).		
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b) Allocation Plan & Risk Management Plan.**Communication Plan & Resources:**

Communication Plan & Resources		
S.No.	Details	Plan & Resources
1	Internal	Project Manager, Business Analyst, Development Team & Testers
2	External	Stakeholders, End-users & Third-Party vendors
3	Daily Stand Ups	Daily Progress & Challenges
4	Weekly Meetings	Live Project update & communication with Stakeholders
5	Emails	For official communication & Documentation
6	Virtual	Real time communication & collaborations (MST/ZOOM/GMEET)

Tools, Resources & Risk Management Plan:

Tools & Resources		
S.No.	Details	Resources
1	Project Management	Microsoft Project, Primavera P6
2	Development	AWS, GitHub, TensorFlow
3	Testing	Selenium, JIRA
4	Communication	Slack, Zoom, Microsoft Teams
Risk Management		
S.No.	Details	Resources
1	Risk	Delays in AI integration
	Mitigation	Allocate more resources to the AI team or hire an external AI expert
2	Risk	Budget overrun due to unexpected costs
	Mitigation	Set aside a contingency budget
3	Risk	Miscommunication by specific team member
	Mitigation	In person discussion & mutual agreement on points raised

c) **Quality Management Plan:**

Quality Management		
S.No.	Details	Resources
1	Automated Testing	Functionality Testing of CRM
2	User Acceptance Testing	End User testing on overall operations of CRM with feedback
3	Code Review	Assurance on coding to avoid duplicity

d) **Agile Scrum Sprints:**

Agile Scrum Sprints			
S.No.	Sprints	Plan	Timelines
1	Sprint-1	Define project scope and create the project charter.	2 weeks
2	Sprint-2	Develop the customer interaction management module	2 weeks
3	Sprint-3	Develop the sales pipeline management module	2 weeks
4	Sprint-4	Integrate AI for predictive analytics	2 weeks
5	Sprint-5	Conduct automated testing and fix bugs	2 weeks
6	Sprint-6	Conduct user acceptance testing (UAT) and finalize the CRM	2 weeks

e) **Vendor & Contracts Management:**

Vendor Contracts-Fixed Price Contract		
S.No.	Sprints	Plan
1	Definition	Fixed-Price Contract/ Lump Sum/ Fixed Fee is an agreement between Buyer & Seller in which the buyer agrees to finalize the Proposed CRM Development Software as services for a set price The Seller assumes all risks associated with the completion of the project according to the agreed specifications and timeline.
2	Advantage	Using a fixed-price contract have several advantages for involved Buyer & Seller. It allows buyers to budget accurately and better plan for completion of project, while Seller can be assured that they will receive their full payment regardless of how much they need to invest in the project. Additionally, it can also encourage Seller to complete the project as quickly and efficiently as possible in order to increase their profits.
3	Risk Cover & Conclusion	Fixed-price contract includes all necessary information regarding the terms of the agreement, such as a description of the Services, payment schedule and amount, The timeline for completion of work, any warranties or guarantees associated with delivery, and any other special provisions that relate to the specific project.
4	Terms & Conditions and Performance Improvement Plans	Timelines: Project completion & Successful Handover by or before 150days from date of Contract.
5		Compilation: Fortnightly Formal performance reviews at regular intervals to assess progress, provide feedback, and discuss areas for improvement.
6		Address Potentials: Address Potential issues-Early Warning Signs & Performance Improvement Plans

- **Vendor Contracts:**

- **Cloud Service Provider:** Sign a contract with **AWS** for cloud hosting, with clear terms on uptime and support.
- **AI Tool Provider:** Sign a contract with **TensorFlow** for AI integration, with clear terms on performance and updates.

f) Change Management Plan

- **Change Control Process:**

- Document any requested changes to the project scope.
- Evaluate the impact on the timeline, budget, and resources.
- Get approval from stakeholders before implementing changes.

g) Project Closer Plan:

Final Deliverables:

CRM System: Fully functional CRM platform.

Final Report: Project Summary including challenges faced and lessons learned.

Presentation: Go Live CRM system to stakeholders.

h) Assumptions and Constraints:

Assumptions:

Mid-sized enterprises are willing to pay for a scalable CRM system.

AI and predictive analytics will add significant value to the CRM.

Constraints:

Limited budget of INR 50 lakh.

Tight timeline of 4-6 months.

i) Appendix:

Project Charter: Document outlining the project objectives, scope, and stakeholders.

Risk Register: Detailed list of identified risks and mitigation strategies.

Communication Plan: Detailed plan for communication with stakeholders.

Gantt Chart: Visual representation of the project timeline.

j) Conclusion:

This Project Management Plan provides a comprehensive roadmap for the successful execution of the Tech Nova Solutions CRM Project. By following this plan, the project team ensure that the CRM system is delivered on time, within budget and with quality parameters in all respect.

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