Preliminary Project Scope Statement

CRM Migration Project - Longhorn Inc

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Longhorn Inc
#200, 2343 Sixth St
Austin, Texas 77840

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1. Project Description

The current CRM system being used by Longhorn Inc. for their day-to-day activities is outdated. The servers on which these system runs on are old and it causes the system to be extremely slow, adversely affecting their activities. The project team is constituted for the successful migration of the existing CRM system to a new one. All the activities related to CRM migration will come under the scope of the project including Hardware upgradation. The ultimate aim of the project is to increase the donor and customer base of the Longhorn Inc. so that the company can extend its free service to new areas.

2. Project Purpose

The purpose of the project is to develop a CRM system for Longhorn Inc and migrate their existing CRM system to the new one. This would help them to expand their operations and services to new urban areas. The sponsor representatives have specified the list of features which the new CRM system should include. They have also specified additional requirements like providing IT support for the new system and to provide training materials for their employees to learn the new system. Purpose of the project also includes analyzing the existing server for its capability to support the new system and then upgrade the existing server or replace it with a new one.

3. Project Objectives

After the successful CRM migration, the new CRM system should have the following capabilities.

- The proposed system must be able to efficiently handle 5 times the size of current donor database.

- New system must support Real time Analytics.

- New system must have faster response times.

- New CRM system should support social media integration with Facebook and twitter.

- We need to increase server capabilities for the better good.

- Last but not the least all the above-mentioned requirements should be achieved and budget should be limited to $100,000

- The migration should be done keeping in mind about the further expansions of Longhorn Inc.

4. Project Requirements

The main requirement of the project will be that it should be able to handle the system cater a bigger donor base effectively and efficiently.

- Each donor will have their own donor account which will maintain their record of donations in the past.

- Each donor will be assigned a Relationship Manager who track specific set of donors and fulfill their requests. Each donor should have online account in the system.

- The new system should have Call/Chat support which can be used by donors.

- System should support Real Time Analytics and should have forecasting capability.

- Training materials should be made available in the system so that Longhorn Inc. employees can easily learn to use the new system.

- IT support must be provided for the new system.

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- New system should support web access and social media integration through Facebook and Twitter.

5. Project Assumptions

The Longhorn Inc. is going to be executed based on the following assumptions.

- The duration of the project will be 6 months. Project is scheduled to complete till its implementation phase within this time.

- After the completion of the project, the system will support the all the expansion plans of Longhorn Inc. in near future. Size of expansion is already fixed and will not be changed.

- Fund will be disbursed without any delay as the project progress and it will be completed within the budget limit of $1,00,000. A large fraction of the budget will be allotted while purchasing new hardware.

- Project team will provide IT support for the system after its implementation for a period of 6 months.

- All the milestone phases of Software Development Life Cycle will be completed as per the schedule.

- Study materials will be made available to the team as per the schedule for training the employees.

- All the accounts which are going to be created will have industry standards of security and it will be less vulnerable.

6. Project Constraints

Following are the constraints which could be faced in the upcoming phases of CRM Migration project.

- We have limited resource of 3 members in the project team. There is no backup plan in case of emergency.

- Project budget of $100,000 is very limited considering that hardware upgradation also has to be done.

- We have plans to purchase license for Real time analytics tools for which the prices are subjected to change. It will be a serious constraint if it is rises beyond the estimate.

- Flow of donations for the project should be uninterrupted so that it reaches at least the current budget.

- If we cannot get same hardware that we have decided as of now, it can seriously impact the performance of the new system.

7. Project Risks

The associated risks in the implementation of the new CRM system include,

- Existing servers crashing before upgrade/replacement.

- New servers not sufficient to support the new system and future demand.

- Disagreement on proposed UI concepts for the new system.

- Disagreements about requirements documentation.

- Disagreements about cost estimation.

- System objectives change over the span of system development.

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- Actual cost of the system exceeds the fixed budget of $100,000.

- Implementation of the system exceeds the stated deadline.

- The new system does not effectively meet the purpose of the project.

8. Project Deliverables

The deliverable at the end of this project is a new CRM system with relevant IT support that has the following features:

- Donation Tracking

- Support for funding campaigns

- Social media integration

- Real time data analytics

- Web access

- Customizability

- Reporting

- Online employee training

- IT support

- Forecasting capability

9. Project Milestones

The following table contains a roadmap to the various project milestones,

Milestone Date	Milestone Name	Milestone Description
[Feb 25]	Requirements Analysis & System Requirements Specification	Understand the requirements of the system and create the SRS document.
[Mar 15]	Analyze the existing server	Analyze the capabilities of the existing servers to decide whether to upgrade or replace them.
[Mar 30]	Upgrading/Installing server	Once the decision is made whether to upgrade existing server or to install new server, execute it.
[April 20]	High level architecture design	Design the high-level architecture of the system to be developed.
[July - August]	Modules implementation and unit testing	Translate the high-level design to code with unit testing.
	System and integration testing	Various modules are integrated and whole system is tested.
	Deployment in production environment	The system is finally deployed in the production environment for use.

10.   Rough Order of Magnitude (ROM) Estimate

Activity	Estimated Time
Requirement Analysis & Design	30-40 Resource Hours
Server Analysis and Upgrade/Replace	30-50 Resource Hours
Product Development	90-100 Resource Hours
Product Testing	20-30 Resource Hours
Product Deployment	30-50 Resource Hours