Project 10

Longhorn Inc. CRM Migration

Business Problem:

Longhorn Inc. provides housing and tutoring services to at risk youth in Chicago area. The main source of income for this company is the donors which is quite good for them. They want to develop the breadth of its services and expand operations to new urban areas. They have an outdated CRM system for managing donations, supporting funding campaigns, organizing volunteer assignments and tracking donation trends. Their servers are facing storage issues and are slow. The user interface is difficult to learn for the employees who are mostly part-time workers.

In scope:

They want to migrate their old CRM to new CRM system which should provide them flexibility, customizability, efficiency and forecasting capabilities. The servers need to be replaced or upgraded whichever is efficient. They want following features in the new CRM:

- o Donation tracking
- o Supporting funding campaigns
- o Social media integration with Facebook and Twitter
- o Forecasting
- o Analytics: Real Time Analytics
- o IT Support: Call/chat support, Quick Response
- o Organizing volunteer assignments
- o Donors follow-up
- o Web access
- o Customizability
- o Reporting
- o Online training material for the employees

The budget has been established at $100,000 for the infrastructure and the CRM implementation along with IT support and needs to be completed in 6 months.