# **Enhancement of CRM Tool in B2B Services**

**Document 1- Business case document template.**

**Why is this project initiated?**

* This project is initiated to enhance the current CRM tool by adding post-purchase service features such as client onboarding, support ticketing, live chat, client portal, and feedback collection.
* The goal is to provide an end-to-end client lifecycle management platform that improves customer satisfaction, operational efficiency, and retention rates**.**

**What are the current problems?**

* No formal client onboarding process after sales closure.
* Support activities are disconnected from CRM, handled manually via emails, calls, or external tools.
* Sales executives are overloaded with post-sale service work, reducing their time for new business generation.
* Client queries and complaints are delayed, affecting customer satisfaction.
* Lack of visibility into client health, service status, and post-sale engagement metrics.

**With this project how many problems could be solved?**

* Automated onboarding will ensure smooth and consistent client activation.
* Centralized support ticketing will allow better tracking and faster resolution of client issues.
* Live chat integration will provide real-time support to clients.
* Client portal access will empower customers to self-service for basic queries and documentation.
* Automated feedback surveys will give continuous insights into client satisfaction and service gaps.
* Sales team efficiency will improve, allowing more focus on lead generation and upselling.

**What are the resources required?**

**Human Resources:**

CRM Administrator  
Project Manager

Business Analyst

Sales, Marketing and Support Team Representatives (for requirement gathering and UAT)

IT Developers/Consultant for integration

Testing Team

**Time:-** 3 to 5 months

**Technical Resources:**

CRM Platform Access

Existing App/website   
Internet Bandwidth  
Development and Testing tools

Plugins/Add-ons for onboarding workflows, ticketing, chat, feedback surveys

Integration tools – API’S

**Financial Resources**: Budget allocation for licenses, third-party integrations, minor development (Rs. 20,00,000)

**Training Resources:** Training material and Tools(Teams, Google meet)

**How much organizational change is required to adopt this technology?**

**Medium Level Change** is required:

* Sales and Support teams will need training on using the new features (portal management, ticketing, live chat systems).
* Processes will be slightly redefined to automate onboarding and client servicing.
* Internal SOPs (Standard Operating Procedures) will be updated.
* Change management sessions and early adoption workshops are recommended to ensure smooth transition.

**Time frame to recover ROI?**

* Expected ROI Recovery Timeframe: 6 to 9 months
* Recovery will happen through:
  + Increased client retention and lifetime value (LTV).
  + Decreased support workload (saving man-hours).
  + Faster upselling/cross-selling due to better client relationships.
  + Reduction in new client acquisition cost through improved referrals and testimonials.

**How to identify Stakeholders?**

**Stakeholders can be identified by:**

* Mapping all users and teams directly interacting with client’s post-sale (Sales Team, Support Team, Marketing Team, social media Team).
* Identifying leadership roles responsible for client retention, revenue growth, and CRM management (Sales Manager, CRM Admin, IT Head).
* Involving external parties if needed (vendors of CRM plug-ins or consultants).
* Classifying stakeholders into primary (direct users)  
   1. Sales Team

2. Client support Team

3. Clints

* secondary (management and supporting teams).  
  1. Marketing and Social Media Teams

2. Technical team

* Creating a stakeholder matrix to prioritize their involvement and communication needs during the project.

**BA Approach Strategy for Completing a Project**

**1. Elicitation Techniques to Apply:**

To gather correct and complete requirements, a BA must use:

* **Interviews:** One-on-one discussions with key stakeholders (Sales Team, Support Team, Clients).
* **Workshops:** Group discussions for requirement finalization.
* **Surveys/Questionnaires:** For collecting mass feedback easily (especially from clients, Sales and Support Teams).
* **Observation:** Observe how sales/support teams work today on CRM.
* **Document Analysis:** Study existing CRM process flows, service tickets, feedback forms.

**2. Stakeholder Analysis:**

Identify and categorize stakeholders using **RACI** (Responsible, Accountable, Consulted, Informed)

* **Sales Managers** - Responsible
* **Customer Support** - Responsible
* **Clients** – informed
* **CRM Admin Team/IT team**  - Consulted
* **Senior Management** – Accountable

**3. Documents to Write:**

* Business Requirements Document (BRD)
* Functional Requirements Specification (FRS)
* Software Specification Document
* Software Requirements Documents
* Application Document - High level Design Document
* Solution Document - Individual
* Low Level Design Document
* Test Case Document
* User Manuals/Training Documents

**4. Process to Follow for Sign-off on Documents:**

* Submit draft versions to stakeholders.
* Conduct walkthrough sessions (Zoom/Teams meetings).
* Collect feedback and update the document.
* Send the final version via email for formal sign-off (written approval or e-signature).
* Track approvals in Document Control Logs.

**5. How to Take Approvals from the Client:**

* Share clear summary reports of deliverables.
* Provide demo sessions of prototype/mockups.
* Collect written/email approval on:
  + Requirements
  + Design mockups
  + UAT Test Plan
  + Final Solution

**6. Communication Channels to Establish and Implement:**

* **Emails**: Formal communications and approvals.
* **Microsoft Teams/Slack**: Day-to-day project coordination.
* **JIRA/Asana/Trello**: Task tracking and updates.
* **Project Status Reports**: Weekly shared with all stakeholders.
* **Workshops/Meetings**: Milestone reviews.

**7. Handling Change Requests:**

* Define a formal Change Management Process.
* Changes must be:
  + Documented in Change Request (CR) Form.
  + Impact Analysis done (time, cost, scope).
  + Approved by Change Control Board (CCB) or client sponsor.
* Update Scope/Requirements Documents if needed.

**8. Updating Project Progress to Stakeholders:**

* **Weekly Status Reports** (Progress % vs. Planned %).
* **Dashboard Updates** (Using Power BI/Excel Dashboard).
* **Highlight Risks/Issues** in advance.
* **Change Logs and Decision Logs** updated weekly.

**9. Taking Sign-off on UAT (Client Project Acceptance Form):**

* Execute **UAT Test Cases** with client representatives.
* Capture **Defects/Feedback**.
* Ensure **critical bugs are fixed** and retested.
* Prepare a **Client Project Acceptance Form** mentioning:
  + Deliverables accepted
  + Outstanding issues (if any)
  + Client’s final confirmation
* Take **formal sign-off** with date and signatures.

**Document 3- Functional Specifications**

|  |  |
| --- | --- |
| **Project Name** | CRM Tool Enhancement for B2B post-sales Services |
| **Customer Name** | Foundit.ai |
| **Project Version** | 1.0 |
| **Project Sponsor** | Quess |
| **Project Manager** | Swapna |
| **Project Initiation Date** | 24-04-2025 |

**Functional Requirement specifications:**

|  |  |  |  |
| --- | --- | --- | --- |
| **Req ID** | **Req Name** | **Req Description** | **Priority** |
| FR001 | Client Knowledge Base Access | Allow clients to access FAQs, guides, and documentation. | 9 |
| FR002 | Support Ticket Creation | Clients can raise tickets and track resolution status. | 10 |
| FR003 | Live Chat Integration | Enable live chat for real-time support within CRM. | 10 |
| FR004 | Client Portal Access | Secure portal for clients to manage onboarding, tickets, documentation. | 9 |
| FR005 | Feedback Survey Submission | Send and collect post-service feedback via CRM. | 7 |
| FR006 | Automated Onboarding Workflow | Create and track onboarding steps for new clients. | 10 |
| FR007 | Welcome Email & Training Scheduler | Automatically send welcome kits and schedule first training call. | 8 |
| FR008 | Account Health Monitoring | Track client account status (active, at-risk) on dashboard. | 8 |
| FR009 | Alerts & Reminders | Notify users and clients on pending activities. | 8 |
| FR010 | Ticket Management Dashboard | Support Team to view/manage all tickets from one place. | 10 |
| FR011 | Feedback Survey Management | Analyze and report customer feedback. | 7 |
| FR012 | Must have Access | Client must have customer support access option to perform post purchase services | 10 |

**Document 4- Requirement Traceability Matrix**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Req ID** | **Req Name** | **Req Description** | **Design** | **D1** | **T1** | **D2** | **T2** | **UAT** |
| FR001 | Client Knowledge Base Access | Allow clients to access FAQs, guides, and documentation. | Completed | Pending | Pending | Pending | Pending | Pending |
| FR002 | Support Ticket Creation | Clients can raise tickets and track resolution status. | Completed | Pending | Pending | Pending | Pending | Pending |
| FR003 | Live Chat Integration | Enable live chat for real-time support within CRM. | Completed | Pending | Pending | Pending | Pending | Pending |
| FR004 | Client Portal Access | Secure portal for clients to manage onboarding, tickets, documentation. | Completed | Pending | Pending | Pending | Pending | Pending |
| FR005 | Feedback Survey Submission | Send and collect post-service feedback via CRM. | Completed | Pending | Pending | Pending | Pending | Pending |
| FR006 | Automated Onboarding Workflow | Create and track onboarding steps for new clients. | Completed | Pending | Pending | Pending | Pending | Pending |
| FR007 | Welcome Email & Training Scheduler | Automatically send welcome kits and schedule first training call. | Completed | Pending | Pending | Pending | Pending | Pending |
| FR008 | Account Health Monitoring | Track client account status (active, at-risk) on dashboard. | Completed | Pending | Pending | Pending | Pending | Pending |
| FR009 | Alerts & Reminders | Notify users and clients on pending activities. | Completed | Pending | Pending | Pending | Pending | Pending |
|  |  |  |  |  |  |  |  |  |
| FR010 | Ticket Management Dashboard | Support Team to view/manage all tickets from one place. | Completed | Pending | Pending | Pending | Pending | Pending |
| FR011 | Feedback Survey Management | Analyze and report customer feedback. | Completed | Pending | Pending | Pending | Pending | Pending |

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| FR012 | Must have Access | Client must have customer support access option to perform post purchase services | Completed | Pending | Pending | Pending | Pending | Pending |

**Document 5- BRD Template**

**CRM Tool Enhancement for B2B post-sales Services**

**CRM-ENH-2025-01**

**V 1.0**

**Nallamothu Harish**

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**1. Document Revisions.**

|  |  |  |
| --- | --- | --- |
| **Date** | **Version Number** | **Document changes** |
| 24-04-2025 | 1.0 | Initial Draft |
| 01-05-2025 | 1.0 | Final Draft |
|  |  |  |

**2. Approvals**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Role** | **Name** | **Tittle** | **Signature** | **Date** |
| Project Sponsor | Z | Board Member |  | 25-04-2025 |
| Business owner | Y | Director |  | 25-04-2025 |
| Project Manager | X | PM |  | 25-04-2025 |
| System Architect | A | SA |  | 25-04-2025 |
| Development Lead | B | DL |  | 25-04-2025 |
| User Experience Lead | C | UE |  | 25-04-2025 |
| Quality Lead | D | QL |  | 25-04-2025 |
| Content Lead | E | CL |  | 25-04-2025 |

**3. RACI Chart for This Document**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Name** | **Position** | **Responsible (R)** | **Accountable (A)** | **Consulted (C)** | **Informed (I)** |
| Nallamothu Harish | Business Analyst | R |  |  |  |
| Mr. X | Project Sponsor |  | A |  | I |
| Ms. Y | Business Owner |  | A | C | I |
| Mr. Z | Project Manager | R | A | C | I |
| Ms. A | System Architect | R |  | C | I |
| Mr. B | Development Lead | R |  | C | I |
| Ms. C | Quality Lead | R |  | C | I |
| Sales Executive Team | End Users |  |  | C | I |
| Support Executive Team | End Users |  |  | C | I |
| Clients | External Users |  |  | C | I |

**4. Introduction**

The CRM system currently focuses only on pre-sales activities. This project will enhance the CRM by adding post-sales service modules to improve client experience and operational efficiencies.

. **4.1 Business Goals**

* Improve client retention.
* Enable real-time service support.
* Automate client onboarding post-sales.

**4.2 Business Objectives**

* Implement onboarding workflows and client portals.
* Enable live chat and feedback mechanisms.
* Centralize client support tickets in CRM.

**4.3 Business Rules**

* Only registered clients can create tickets.
* Support executives must close tickets within SLA time.
* Feedback must be collected post-resolution.

### **4.4 Background**

### In the current CRM setup, after-sales support is not handled systematically. This leads to client dissatisfaction and operational overhead.

**4.5 Project Objective**

* Build seamless onboarding for clients.
* Ensuring End to End operation in CRM Tool for Business Process
* Up selling the Product or Service
* Provide self-service and real-time issue resolution tools.

**4.6 Project Scope**

**In-Scope:**

* Client onboarding automation
* Ticket Management
* Live Chat integration
* Feedback collection
* Client Portal access

**Out-of-Scope:**

* CRM core architecture redesign.
* DB Integration with existing one
* Client interaction with the new application
* Mobile app integration (future phase)

**5. Assumptions**

* CRM Platform can integrate plug-ins easily.
* All stakeholders are available for UAT.
* Planning for Mobile Application (Future)
* User friendly for the clients
* Easy adoption for integration of the system
* Requires large band with and strong internet connection.

**6. Constraints**

* Budget capped at Rs. 2,00,0000.
* Project to be completed in 5 months.
* This project Need well trained developers and Testers for developing and testing.
* The application is a supplement to an existing product, so it must integrate with and augment the experience of that product.
* The application must perform without bugs on all platforms.
* Risks include schedule delays, hardware and memory failures, and difficulties formatting the application on existing platforms.

**7. Risk**

**1. Avoidance:**

* **Situation**

If a new feature requires significant changes to the core CRM architecture and poses a high risk of disruption, you might choose to postpone its development or explore alternative solutions that minimize the need for major changes.

* **How it works:**

By carefully assessing the impact of each post-service function, you can proactively decide which ones can be safely added without causing undue risk.

* **When to use:**

This strategy is most effective when the risk is high and the potential impact is significant, making it worth the cost of postponing or re-evaluating the function

**2. Mitigation:**

**Situation**

* If integrating a new post-service feature with an existing CRM API introduces the risk of compatibility issues, you can implement rigorous testing and quality assurance processes to reduce the likelihood of errors.
* **How it works:**

Mitigation involves identifying potential issues, implementing preventative measures, and developing strategies to minimize the impact of those issues if they do occur.

* **When to use:**

This strategy is suitable for risks that have a moderate impact, and where it's possible to reduce the likelihood or the severity of the consequences through careful planning and execution

**3. Transfer:**

* **Situation:**

You might outsource the development of a new post-service function to a vendor specializing in CRM integrations, transferring the risk of development delays or feature failures to the vendor.

* **How it works:**

By transferring the responsibility for a specific risk to another party, you reduce your own exposure to potential losses.

* **When to use:**

Transfer is most effective when you lack the internal resources or expertise to handle a particular risk, or when the cost of managing the risk yourself is higher than the cost of transferring it.

**4. Acceptance:**

* **Situation:**

If the risk of a specific post-service function being implemented is low, you might choose to accept the potential impact without taking any specific preventative measures, simply having contingency plans in place to address any issues that arise.

* **How it works:**

This strategy acknowledges that some risks are unavoidable and focuses on planning for the consequences rather than trying to eliminate the risk entirely**.**

* **When to use:**

Acceptance is appropriate for risks where the potential impact is relatively low, and the cost of avoiding or mitigating the risk outweighs the potential loss.

**Technological Risks:-** Integration of CRM with new modules (onboarding, live chat, ticketing) may fail or be delayed.

**Skills Risks:-** Team members (Sales, Support) may lack the skills to operate enhanced CRM functionalities**.**

**Political Risks**:- Internal resistance from teams who are comfortable with old manual methods.

**Business Risks:-** If project is delayed, client onboarding experience remains poor, leading to potential client churn.

**Requirements Risks**:- Requirements might not be fully captured initially, leading to rework or missing functionalities.

**Other Risks**:- Budget overruns due to unexpected customization needs.

**8. Business Process Overview**

**8.1. Legacy System (AS-IS) :-** Current Process

Lead Generation → Lead Qualification → Opportunity Management → Sale Closure → Manual Handover → Client on Own for Service

**Key Problems:**

* No formal onboarding after sale closure.
* Support is manually handled via emails/calls.
* No system for tracking service tickets/issues.
* No client self-service access (no portal).
* No post-purchase engagement tracking.

**8.2 Proposed Recommendations (TO-BE Process):-** Enhanced Process

Lead Generation → Lead Qualification → Opportunity Management → Sale Closure

↓

Automated Onboarding Workflow Initiated

↓

Welcome Email + Training Scheduler Sent

↓

Client Accesses Portal (Onboarding + Support)

↓

Client Raises Support Ticket / Starts Live Chat

↓

CRM Captures Ticket → Support Executive Resolves

↓

CRM Sends Feedback Survey Post-Resolution

↓

CRM Dashboard Updates Client Health Score

* **AS-IS** section explains existing **gaps and problems**.
* **TO-BE** section shows **solutions and improvements**.
* **9. Business Requirements**

|  |  |  |  |
| --- | --- | --- | --- |
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| FR012 | Must have Access | Client must have customer support access option to perform post purchase services | 10 |

**10. Appendices**

**10.1. List of Acronyms**

| **Acronym** | **Full Form** |
| --- | --- |
| BA | Business Analyst |
| CRM | Customer Relationship Management |
| SOP | Standard Operating Procedure |
| FR | Functional Requirement |
| UAT | User Acceptance Testing |
| ROI | Return on Investment |
| SLA | Service Level Agreement |
| API | Application Programming Interface |
| UI | User Interface |
| BRD | Business Requirements Document |
| FRS | Functional Requirements Specification |
| RACI | Responsible, Accountable, Consulted, Informed |

**10.2. Glossary of Terms**

| **Term** | **Definition** |
| --- | --- |
| **CRM Tool** | A software application used to manage a company's interaction with current and potential customers, often focused on sales, service, and support. |
| **Onboarding Workflow** | A series of predefined steps and tasks that guide a new client through the setup or activation phase after purchasing a service. |
| **Support Ticket** | A recorded customer complaint or request that requires resolution by the support team. |
| **Client Portal** | A secure, web-based interface that allows clients to view information, track issues, and access services. |
| **Feedback Survey** | A form used to collect opinions from clients after a service or interaction, often used to measure satisfaction. |
| **Live Chat Integration** | A feature that allows real-time text communication between the client and support staff within the CRM. |
| **Account Health Score** | A visual or numerical representation of how engaged, satisfied, or at-risk a client account is, based on activity and feedback. |
| **Business Analyst** | A professional who analyzes business processes and gathers requirements for system improvements. |
| **Traceability Matrix** | A document that maps requirements to their corresponding design, development, and test cases for validation. |
| **Change Request (CR)** | A formal proposal to modify any aspect of the project scope or functionality after the BRD is signed off. |