BUSINESS CASE DOCUMENT

Lead Management System

Abstract

Streamlining Lead Tracking and Conversion

Vaishnavi Rathod

Executive Summary

- Project Title: Lead Management System
- Project Sponsor: Mr. XYZ
- Project Manager: Vaishnavi
- Project Duration: 6 months
- Budget: $50,000.

Objectives

- To streamline lead management processes by implementing a centralized system.
- Enhance team collaboration and communication through shared tools and resources.
- Automate repetitive tasks to save time and reduce errors in lead tracking and conversion.
- Provide actionable insights through analytics for better decision-making.
- Ensure scalability and adaptability to meet future organizational needs.

Project Initiation

Why is this project initiated?

- This project is initiated to address the inefficiencies in managing leads, improve conversion rates, and enhance the overall productivity of sales and marketing teams. It aims to provide a centralized system for tracking, prioritizing, and converting leads, thereby addressing current operational gaps.

Current Problems

What are the current problems?

- Manual tracking of leads is time-consuming and prone to errors.
- Lack of centralized data results in lost leads and missed opportunities.
- Inefficient collaboration among teams hampers lead conversion efforts.
- Limited visibility into lead metrics and analytics for informed decision-making.

Problem Resolution

With this project, how many problems could be solved?

- This project aims to resolve the following issues:
    - Eliminate manual processes through automation.
    - Centralize lead data for better accessibility and tracking.
    - Improve team collaboration with shared tools and resources.
    - Provide robust analytics to track performance and optimize strategies.

Resource Requirements

What are the resources required?

- **Human Resources:**
    - Project Manager, Software Developers, UX/UI Designers, and Data Analysts.
- **Technology Resources:**
    - CRM software, database systems, cloud infrastructure, and analytics tools.
- **Financial Resources:**
    - Budget for development, testing, deployment, and training.
- **Time Resources:**
    - Estimated duration of 6 months for project completion.

Organizational Change

How much organizational change is required to adopt this technology?

- **Structural Changes:** Minimal changes to team structures but increased collaboration across departments.
- **Process Adjustments:**
    - Adoption of automated workflows for lead management.
    - Training sessions for team members to familiarize them with the new system.
- **Cultural Shift:** Emphasis on data-driven decision-making and accountability.

Return on Investment (ROI)

Time frame to recover ROI?

- The project is expected to deliver value by automating lead management, reducing operational costs, and increasing sales efficiency.
- With an initial investment of $50,000 and a project duration of 6 months, the system will start yielding measurable benefits post-deployment.
- ROI recovery is anticipated within a reasonable timeframe as savings accumulate through streamlined workflows and enhanced lead conversion rates.
    - Project timeline: 6 months.

Stakeholder Identification

How to identify stakeholders?

- **Internal Stakeholders:**
    - Sales and marketing teams who will use the system.
    - IT and operations teams responsible for implementation and maintenance.
    - Leadership for oversight and strategic alignment.
- **External Stakeholders:**
    - Clients and customers who benefit indirectly from improved lead management.
    - Third-party vendors providing software or services.
- **Stakeholder Categorization:**
    - High influence, high impact: Leadership and sales teams.
    - High influence, low impact: IT teams and vendors.
    - Low influence, high impact: Marketing teams and end-users.
    - Low influence, low impact: Peripheral stakeholders with minimal involvement.

Engagement Strategies:

- Regular updates and meetings for high-influence stakeholders.
- Training and support for end-users to ensure smooth adoption.
- Feedback mechanisms to gather insights and refine the system.

BUSINESS ANALYST (BA) STRATEGY DOCUMENT

Vaishnavi Rathod

Approach Overview

As a Business Analyst, the goal is to ensure successful project delivery by following a structured and collaborative approach. This document outlines the key steps, techniques, and strategies that will be employed to complete the project.

Steps to Complete the Project

Step 1: Stakeholder Analysis

- **Identify Stakeholders:** List of all individuals and groups impacted by the project.
- **RACI/ILS Matrix:**
  - **RACI:** Define Responsible, Accountable, Consulted, and Informed parties.
  - **ILS (Influence, Legitimacy, and Support):** Assess each stakeholder's influence, legitimacy, and support to determine their engagement priority.

Step 2: Elicitation Techniques

- **Conduct Workshops:** Collaborate with stakeholders to gather requirements in group sessions.
- **Interviews:** One-on-one discussions with key stakeholders to uncover detailed needs.
- **Surveys and Questionnaires:** Use structured questions for broad feedback.
- **Observation:** Shadow end-users to understand current workflows and pain points.
- **Document Analysis:** Review existing documentation for insights.

Step 3: Documentation

- **Requirements Documentation:**
  - Business Requirement Document (BRD).
  - Functional Requirement Document (FRD).
  - Non-Functional Requirements (NFRs).
  - Business Case Document
- **Process Flows and Models:**
  - Use case diagrams, process flow diagrams, and activity diagrams.
- **Traceability Matrix:** Track requirements from inception to delivery.
- **Change Log:** Maintain records of all change requests and their statuses.

Step 4: Sign-Off Process

- **Draft Review:** Share the document drafts with stakeholders for initial feedback.
- **Feedback Incorporation:** Address feedback and update documents.
- **Formal Review Meetings:** Conduct meetings to finalize and approve documents.
- **Sign-Off:** Obtain formal sign-off via email or electronic approval systems.

Client Approvals

- **Clear Communication:** Establish a structured process for sharing deliverables (mostly mails).
- **Approval Templates:** Use standardized forms or templates for approvals.
- **Scheduled Reviews:** Conduct milestone-based reviews with clients to seek incremental approvals.

Communication Channels

- **Project Management Tools:** Use platforms like Jira or Microsoft Teams for updates and task tracking.
- **Email Communication:** For formal communication and approvals.
- **Regular Meetings:**
    - Weekly status meetings with stakeholders.
    - Daily stand-ups for team coordination.
- **Status Reports:** Share weekly or bi-weekly progress reports.

Handling Change Requests

- **Change Request Process:**
    - Document the request in a Change Request Form.
    - Analyze the impact on scope, timeline, and budget.
    - Discuss the request with stakeholders and project sponsors.
    - Update the change log with the decision and implementation plan.

Progress Updates

- **Progress Reports:** Share regular updates with stakeholders via email or dashboards.
- **Milestone Tracking:** Highlight completed milestones and upcoming tasks.
- **Risk Updates:** Include any risks or roadblocks and their mitigation strategies.

User Acceptance Testing (UAT)

- **Preparation:** Ensure all test cases and scripts are ready and approved by stakeholders.
- **Execution:** Facilitate the UAT process and address issues raised.

- **Sign-Off:**
  - Use a Client Project Acceptance Form for formal approval.
  - Ensure stakeholders and end-users acknowledge the successful completion of UAT.

FUNCTIONAL SPECIFICATIONS DOCUMENT

Vaishnavi Rathod

Project Details

- **Project Name:** Lead Management System
- **Customer Name:** XYZ
- **Project Version:** 1.0
- **Project Sponsor:** XYZ
- **Project Manager:** Vaishnavi
- **Project Initiation Date:** 3rd Jan 2025

Functional Requirement Specifications

Functional Requirements

Req ID	Req Name	Req Description	Priority
FR0001	Login	User should be able to log in to the application using valid credentials (email/username and password).	10
FR0002	Forgot Password	Users should have an option to reset their password via email verification or security questions.	8
FR0003	Dashboard	Upon successful login, users should be redirected to a dashboard summarizing key lead management metrics.	10
FR0004	Add New Lead	Users should be able to add new leads, including fields like name, contact information, source, and status.	9
FR0005	Edit Lead Details	Users should be able to edit details of existing leads with proper validation and change logs maintained.	9
FR0006	Delete Lead	Users should be able to delete leads, with a confirmation prompt to avoid accidental deletions.	7
FR0007	Lead Assignment	Admins should be able to assign leads to specific team members.	9
FR0008	Lead Scoring	Implement a lead scoring mechanism based on predefined criteria (e.g., engagement level, demographics, etc.).	8
FR0009	Lead Status Management	Users should be able to update the status of leads (e.g., New, Contacted, Qualified, Closed).	9
FR0010	Notifications	Notify users via email or in-app alerts for key events like lead assignment, status change, or approaching deadlines.	8
FR0011	Reporting and Analytics	Provide detailed reports and visualizations on leads' performance, conversion rates, and team efficiency.	9
FR0012	User Management	Admins should be able to create, edit, or deactivate user accounts with role-based permissions.	10

FR0013	Integration with CRM	The system should integrate with third-party CRM tools like Salesforce, HubSpot, etc., for seamless data synchronization.	8
FR0014	Data Export	Users should be able to export lead data in multiple formats (CSV, Excel, etc.).	7
FR0015	Audit Trail	Maintain an audit trail for all critical user activities (e.g., lead updates, deletions, assignments).	9
FR0016	Role-Based Access Control	Restrict access to specific features based on user roles (e.g., Admin, Manager, Sales Rep).	10
FR0017	User Acceptance Testing	Provide a UAT module for stakeholders to validate functionality before deployment.	8
FR0018	Change Request Logging	Allow users to submit and track change requests with details like description, impact, and approval status.	9

Detailed Functional Descriptions

Login

- **Description:** Users log in using a secure login mechanism.
- **Validation:** Enforce password policies (e.g., minimum 8 characters, including uppercase, lowercase, and special characters).
- **Error Handling:** Display user-friendly error messages for invalid credentials or locked accounts.

Dashboard

- **Description:** Summarizes the user's lead data with metrics such as:
  - Number of leads in each stage.
  - Lead conversion rate.
  - Pending tasks and notifications.
- **Customization:** Allow users to customize widgets and metrics displayed.

Lead Management

- **Add Lead:**
  - **Fields:** Name, Contact Info, Source, Assigned Team Member, Status.
  - **Validation:** Mandatory fields highlighted; duplicate leads flagged.
- **Edit Lead:**
  - Track changes made, with the ability to view previous versions.
- **Delete Lead:**
  - Ensure deletions are logged and reversible within a specified period.

Notifications

- **Types:**
  - Email alerts.
  - In-app notifications.
- **Triggers:**
  - New lead assigned.
  - Change in lead status.
  - Upcoming deadlines for follow-up.

Reporting and Analytics

- **Features:**
  - Predefined and customizable report templates.
  - Graphical visualizations (e.g., bar charts, pie charts).
  - Filter options based on date, team, and lead source.

Non-Functional Requirements

Category	Requirement Description
Performance	The system should handle up to 1,000 concurrent users without performance degradation.
Performance	Average response time for user actions should not exceed 2 seconds under normal load.
Performance	The system should support data processing for up to 1 million leads.
Scalability	The architecture should be scalable to accommodate growth in users, leads, and integrations without redesign.
Scalability	Cloud hosting should enable dynamic resource allocation as needed.
Security	Implement role-based access control to ensure users can only access permitted features.
Security	Encrypt all sensitive data, such as passwords and personally identifiable information (PII).
Security	Comply with GDPR and other data protection regulations.
Usability	The system should be intuitive and require minimal training for users.

Usability	**Provide a comprehensive help section with FAQs and troubleshooting guides.**
Usability	**Support multiple languages if required by the customer base.**
Availability	**Ensure 99.9% uptime for the application with planned maintenance windows communicated in advance.**
Availability	**Provide automated failover and disaster recovery mechanisms to minimize downtime.**
Maintainability	**Modular code design to facilitate updates and bug fixes.**
Maintainability	**Comprehensive documentation of the system architecture and codebase.**
Backup and Recovery	**Automatic daily backups of all critical data.**
Backup and Recovery	**Ability to restore data from backups within 2 hours in case of failure.**

Notes

- All functional requirements should be traceable to project objectives.
- Priorities are ranked on a scale of 1-10, where 10 represents the highest priority.

Approval

Prepared By: Vaishnavi
Approved By: XYZ
Date: ND

REQUIREMENT TRACEABILITY MATRIX

Vaishnavi Rathod

Req ID	Req Name	Req Description	Design	D1	T1	D2	T2	UAT
FR0001	Login	User must be able to log in to access the application.	Yes	Pending	No	Yes	Yes	YES
FR0002	Forgot Password	Users should have the option to reset their password via email verification or security questions.	Yes	Pending	No	Yes	Yes	Pending
FR0003	Dashboard	Users should be redirected to a personalized dashboard after login.	Yes	Yes	In Progress	No	Pending	No
FR0004	Add New Lead	Users should be able to add new leads with essential information fields.	Yes	Yes	No	Yes	Yes	YES
FR0005	Edit Lead Details	Users should be able to modify existing lead information with proper change logs.	Yes	Yes	Yes	No	Pending	No
FR0006	Delete Lead	Provide the ability to delete leads with a confirmation prompt.	Yes	No	Pending	No	Yes	No
FR0007	Lead Assignment	Admins should assign leads to team members effectively.	Yes	Yes	No	Yes	Yes	YES
FR0008	Lead Scoring	Implement lead scoring based on predefined metrics.	Yes	Pending	No	No	Yes	Pending
FR0009	Notifications	Notify users for key events such as lead updates or approaching deadlines.	Yes	Yes	No	Yes	Pending	YES
FR0010	Reporting and Analytics	Enable comprehensive reporting on leads and team performance.	Yes	Pending	No	No	Pending	Pending

Notes

- **Design:** Indicates whether the design for the requirement has been completed.
- **D1/D2:** Refers to the first and second design review checkpoints.
- **T1/T2:** Represents the first and second testing phases.
- **UAT:** Indicates whether the requirement has passed User Acceptance Testing.

Approval

Prepared By: Vaishnavi
Approved By: XYZ
Date: 3rd Jan 2025

BUSINESS REQUIREMENTS DOCUMENT (BRD)

Vaishnavi Rathod

Table of Content

Project Details

- **Project Name:** Lead Management System
- **Project ID:** LMS-001
- **Version ID:** 1.0
- **Author:** Vaishnavi

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1. Document Revisions

Version	Date	Description	Author
1.0	15th Jan 2025	Initial Draft	Vaishnavi
1.1	TBD	Revised Based on Feedback	

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2. Approvals

Name	Role	Date	Signature
ABC	Project Sponsor		
DEF	Business Owner		
GHI	Project Manager/ BA		
JKL	System Architect		
MNO	Development Lead		
PQR	User Experience Lead		
STU	Quality Lead		
VWX	Content Lead		

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3. RASCI Chart for This Document

Codes Used in RASCI Chart

- **R:** Responsible
- **A:** Accountable
- **S:** Support
- **C:** Consulted
- **I:** Informed

RASCI Chart

Name	Position	Task	R	A	S	C	I
ABC	Project Sponsor	Document Creation	BA	PM	Dev	QA	Stakeholder
DEF	Business Owner	Document Review	PM	Sponser	Dev	QA	Stakeholder
GHI	Project Manager/ BA	Document Approval	Sponser	PM	QA	Dev	Stakeholder
JKL	System Architect						
MNO	Development Lead						
PQR	User Experience Lead						
STU	Quality Lead						
VWX	Content Lead						

4. Introduction

4.1. Business Goals

- Enhance the efficiency and effectiveness of lead management processes.
- Improve lead conversion rates and customer acquisition efforts.
- Provide comprehensive reporting and analytics for better decision-making.

4.2. Business Objectives

- Automate the lead assignment and tracking process.
- Provide a centralized platform for managing leads and customer information.
- Ensure role-based access to maintain data security and privacy.

4.3. Business Rules

- Only authorized users should access specific data based on their roles.
- Leads must have a unique identifier to avoid duplication.
- Notifications should be triggered for key events like lead assignment and status changes.

4.4. Background

- The current lead management process relies on manual tracking using spreadsheets, leading to inefficiencies and errors.
- The organization aims to adopt a robust Lead Management System to streamline operations and reduce manual efforts.

4.5. Project Objective

- Implement a Lead Management System that integrates with existing CRM tools, automates lead handling, and enhances visibility into lead performance.

4.6. Project Scope

4.6.1. In Scope Functionality

- User authentication and authorization.
- Lead addition, modification, and deletion.
- Role-based access control.
- Real-time notifications and alerts.
- Reporting and analytics dashboards.

4.6.2. Out Scope Functionality

- Direct sales or e-commerce features.
- Marketing automation.
- Non-standard CRM integrations beyond specified tools.

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5. Assumptions

- All users will receive necessary training to use the system effectively.
- Stakeholders will provide timely approvals for key deliverables.
- Necessary infrastructure for hosting the application will be available.

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6. Constraints

- Project must be completed within a six-month timeline.
- Budget for the project is fixed at $50,000.
- Availability of development and testing resources.

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7. Risks

Technological Risks

- Risk of integration issues with existing CRM systems.

Skills Risks

- Limited expertise in using new lead scoring algorithms.

Political Risks

- Resistance from teams accustomed to the legacy process.

Business Risks

- Delays in stakeholder feedback leading to project delays.

Requirements Risks

- Changes in business requirements during the development phase.

Other Risks

- Potential data migration challenges from the legacy system.

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8. Business Process Overview

8.1. Legacy System (AS-IS)

- The current process involves manual lead tracking using spreadsheets, which leads to inefficiencies, errors, and lack of real-time updates.

8.2. Proposed Recommendations (TO-BE)

- A centralized Lead Management System that automates lead assignment, provides real-time status updates, and integrates seamlessly with existing tools.

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9. Business Requirements

- Automate lead assignment to sales representatives.
- Provide real-time notifications and updates.
- Ensure role-based access control for data security.
- Allow comprehensive reporting and data visualization.
- Enable seamless integration with CRM tools.

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10. Appendices

10.1. List of Acronyms

- LMS: Lead Management System
- ROI: Return on Investment
- CRM: Customer Relationship Management

10.2. Glossary of Terms

- **Lead:** A potential customer or client interested in the organization's products or services.
- **Dashboard:** A graphical user interface providing a snapshot of key metrics.

10.3. Related Documents

- Functional Specifications Document.
- Requirement Traceability Matrix.

Prepared By: Vaishnavi
Approved By: XYZ
Date: 15 Jan 2025