**Document 1- Business case document template**

**Answer:** **Project Title: Phyzii (CRM Application)**

* **Why is this project initiated?**

The project is initiated to improve the efficiency, scalability, and productivity of the sales and customer relationship management processes. By centralizing customer data, improving order management, providing analytics tools, enabling mobile accessibility, and enhancing integrations, the organization aims to:

* Streamline operations and reduce manual intervention.
* Improve decision-making through better access to data and insights.
* Enhance customer experience by enabling personalized communication and timely order fulfillment.
* Enable mobility for sales teams, allowing them to work efficiently from anywhere.
* **What are the current problems?**
* **Data Fragmentation**: Customer and order information are stored in multiple systems, leading to difficulty in accessing and updating the data.
* **Inefficient Order Management**: Orders are manually tracked, leading to potential delays, errors, and missed opportunities for up-selling or cross-selling.
* **Lack of Insight**: There is no comprehensive view of sales performance, limiting the ability to track key metrics and make informed decisions.
* **Limited Mobile Access**: Sales teams are not equipped to access critical data or perform tasks on the go, which leads to delays in response times.
* **Siloed Systems**: Existing systems are not integrated with other business applications (e.g., marketing, accounting), leading to redundant efforts and possible inconsistencies in data.
* **With this project, how many problems could be solved?**

The project will address the following problems:

1. **Data Fragmentation**: By implementing a centralized database for contact management, customer data will be unified and accessible across the organization.
2. **Inefficient Order Management**: The order processing system will streamline order creation, tracking, and fulfillment, reducing errors and delays.
3. **Lack of Insight**: Sales performance tracking and customizable reporting tools will provide better visibility into business performance.
4. **Limited Mobile Access**: The mobile functionality will empower the sales team to access critical information and complete tasks on the go, improving their productivity.
5. **Siloed Systems**: By integrating with other business applications, the system will create a seamless flow of data and reduce redundant efforts.

* **What are the resources required?**
* **Human Resources**:
  + Project Manager
  + Business Analyst
  + Developers (Frontend, Backend)
  + QA Engineers
  + Sales Team Representatives (for feedback and user testing)
  + IT Support
* **Technological Resources**:
  + Centralized Database (e.g., SQL Server, MySQL)
  + Order Management Software or Custom-built Application
  + Mobile App Development Tools (e.g., React Native, Swift, Kotlin)
  + BI and Reporting Tools (e.g., Tableau, Power BI)
  + Integration Middleware (e.g., Zapier, MuleSoft)
* **Financial Resources**:
  + Budget for software and hardware (e.g., servers, licenses)
  + Training and support services
  + Contingency fund for unforeseen costs
* **How much organizational change is required to adopt this technology?**
* **Cultural Change**: The shift towards a more data-driven and technology-enabled approach may require a cultural change, particularly in the sales team, as they adopt mobile and automated tools for order and contact management.
* **Process Change**: Existing workflows for order management, reporting, and communication may need to be redefined. Training will be required to ensure smooth adoption.
* **Technological Change**: Employees will need to adapt to a new integrated system and mobile tools. Support systems will need to be set up for troubleshooting.
* **Change Management Strategy**: A phased implementation with training and regular feedback loops will ensure the organization transitions smoothly.
* **Time frame to recover ROI?**

The time frame to recover ROI depends on various factors, such as the scale of implementation and the specific metrics of success (e.g., cost savings, sales increases). However, a typical timeline for ROI recovery could be:

* **Short-term** (0-6 months): Initial improvements in data management and order efficiency leading to cost savings.
* **Medium-term** (6-12 months): Mobile accessibility and better sales tracking leading to increased sales team productivity.
* **Long-term** (12-18 months): Integration of all systems, achieving a seamless workflow, improving customer satisfaction, and maximizing profitability.

Expected ROI recovery: **12-18 months**.

* **How to identify Stakeholders?**

Stakeholders are key individuals or groups that have an interest in the project or its outcomes. Key stakeholders include:

* **Internal Stakeholders**:
  + Sales Team: Direct users of the new system for managing contacts, orders, and reporting.
  + Marketing Team: Users of customer segmentation data for targeted campaigns.
  + IT Department: Responsible for system implementation, maintenance, and integration.
  + Finance Department: Interested in invoicing and billing accuracy, reporting metrics.
  + Management: Key decision-makers who will oversee the project's success and ROI.
* **External Stakeholders**:
  + Software Vendors: Provide necessary tools for integration, reporting, and order management.
  + Consultants/Contractors: For specialized expertise in implementation.
  + Customers: End recipients of improved service and faster order fulfillment.

**Document 2: BA Strategy**

**Answer:**

**1. Elicitation Techniques to Apply**

The following elicitation techniques will be used to gather comprehensive requirements:

* **Workshops**: Conduct structured workshops with stakeholders to gather high-level requirements for contact management, order management, reporting, and integrations.
* **Interviews**: One-on-one interviews with sales, IT, and management teams to gather detailed requirements and pain points.
* **Document Analysis**: Review existing systems, workflows, and documentation to understand the current state and identify gaps.
* **Surveys/Questionnaires**: Distribute surveys to gather input from a broader group of stakeholders and end-users.
* **Observation**: Observe the current processes (e.g., order fulfillment, customer communication) to identify inefficiencies.

**2. Stakeholder Analysis and RACI/ILS**

**Stakeholder Identification**:

* Sales Team: End users of the system.
* IT Team: Responsible for system implementation.
* Marketing Team: Users of customer segmentation.
* Finance Team: Users of invoicing and billing systems.
* Project Sponsor: Key decision-maker and approver.
* External Vendors: Providers of tools/software integrations.

**RACI Matrix**:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Task** | **Responsible** | **Accountable** | **Consulted** | **Informed** |
| Requirements Gathering | Business Analyst | Project Sponsor | Sales, IT | All Stakeholders |
| System Design | IT Team | Project Sponsor | Business Analyst | Sales Team |
| Testing | QA Team | IT Lead | Business Analyst, Sales Team | All Stakeholders |
| Implementation | IT Team | Project Sponsor | Business Analyst | All Stakeholders |

**3. Documents to Write**

1. **Business Requirements Document (BRD)**: Captures the high-level business needs and objectives.
2. **Functional Requirements Document (FRD)**: Details the functionality and features of the system.
3. **Technical Specification Document**: Created in collaboration with IT to outline system architecture and integrations.
4. **Use Cases and User Stories**: Define user interactions with the system.
5. **Test Plan**: Defines the scope, objectives, and criteria for UAT.
6. **Change Request Log**: Tracks and evaluates any change requests during the project.

**4. Process to Follow for Document Sign-Off**

* **Draft Preparation**: Create initial versions of all required documents and ensure completeness.
* **Stakeholder Review**: Share documents with stakeholders for review and feedback.
* **Feedback Incorporation**: Update documents based on stakeholder feedback.
* **Approval Meeting**: Conduct a formal meeting to review final versions.
* **Sign-Off**: Obtain written approval (physical or electronic) from all accountable parties.

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

* **Present requirements, designs, or deliverables in review meetings.**
* **Use a structured format (e.g., summary of changes, impacts, and benefits).**
* **Obtain formal approval through email or a signed acceptance document.**
* **Record approval status in the project documentation.**

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

* **Regular Meetings**: Weekly status meetings with stakeholders.
* **Emails**: Formal communication for approvals, updates, and deliverables.
* **Project Management Tools**: Use tools like Jira or Trello for task tracking and status updates.
* **Dashboards/Reports**: Share progress updates through dashboards or periodic reports.
* **Workshops/Webinars**: For training and explaining complex concepts.

**7. How to Handle Change Requests**

1. **Document Request**: Log all change requests in a Change Request Log.
2. **Impact Analysis**: Evaluate the impact of the change on scope, cost, and timeline.
3. **Stakeholder Review**: Present the findings to stakeholders for decision-making.
4. **Approval**: Obtain formal approval for changes from the project sponsor.
5. **Update Documentation**: Update BRD, FRD, and other documents as necessary.

**8. How to Update Project Progress to Stakeholders**

* **Weekly Status Reports**: Include project milestones, progress, risks, and issues.
* **Milestone Reviews**: Present milestone achievements in scheduled meetings.
* **Dashboards**: Use visual dashboards for real-time progress tracking.
* **Communication Matrix**:
  + Daily: Internal team updates.
  + Weekly: Updates to key stakeholders.
  + Monthly: Progress reviews with sponsors and leadership.

**9. How to Take Sign-Off on UAT**

* **Develop UAT Plan**: Define scope, criteria, and test scenarios.
* **Coordinate Testing**: Conduct UAT sessions with end-users and key stakeholders.
* **Capture Feedback**: Record issues, suggestions, and approval status.
* **Acceptance Form**: Create a Client Project Acceptance Form for formal sign-off, including:
  + List of test cases executed.
  + Approval signatures from stakeholders.
  + Final comments or issues (if any).

**Document 3- Functional Specifications**

**Answer:**

**Project Overview**

|  |  |
| --- | --- |
| **Project Name** | **Contact and Order Management System** |
| **Customer Name** | [Insert Customer Name] |
| **Project Version** | 1 |
| **Project Sponsor** | [Insert Sponsor Name] |
| **Project Manager** | [Insert Manager Name] |

**Functional Requirement Specifications**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Req ID** | **Req Name** | **Req Description** | **Priority** | **Functional Details** |
| FR0001 | Login | Users should be able to log in to the application to perform inventory operations. | 10 | - Role-based authentication: Admin, Sales, and Support. |
| - Forgot password functionality. |
| FR0002 | Centralized Database | The system should store and manage customer data, including contact details, company information, and purchase history. | 9 | - Fields include Name, Email, Phone, Address, Purchase History. |
| - Enable search and filtering functionality. |
| FR0003 | Contact Segmentation | Allow grouping of customers based on demographics, interests, and buying behavior. | 8 | - Enable creation of custom segments. |
| - Auto-tagging of contacts based on purchase trends. |
| FR0004 | Order Processing | Users should be able to create, manage, and track orders from placement to fulfillment. | 10 | - Order status: Pending, Processing, Shipped, Delivered. |
| - Notifications for order updates. |
| FR0005 | Inventory Management | The system should track inventory levels and notify users when stock is low to ensure timely order fulfillment. | 9 | - Minimum stock level alerts. |
| - Reorder recommendations based on sales trends. |
| FR0006 | Invoicing and Billing | Generate invoices automatically and allow users to process payments securely. | 10 | - Support for multiple payment methods (Credit Card, PayPal, etc.). |
| - PDF invoice generation and email delivery. |
| FR0007 | Sales Reporting | Monitor key sales metrics, such as revenue, conversion rates, and sales cycle length, through analytics. | 8 | - Metrics include Total Sales, Revenue per Customer, and Average Order Value. |
| - Monthly and yearly views. |
| FR0008 | Customizable Reports | Users should be able to generate reports tailored to specific business requirements. | 8 | - Filters by date range, product category, and customer segment. |
| - Export options: Excel, CSV, PDF. |
| FR0009 | Dashboard | Provide an interactive dashboard to visualize key performance indicators (KPIs). | 7 | - KPIs: Revenue, Customer Retention, and Order Fulfillment Rate. |
| - Customizable widgets for users. |
| FR0010 | Mobile Accessibility | Allow users to access data and perform key functions on mobile devices. | 8 | - Mobile-responsive design. |
| - Core functionalities available: Contact search, order tracking, and reporting. |
| FR0011 | Integrations | Enable seamless integration with marketing automation tools, e-commerce platforms, and accounting software. | 9 | - API-based integration with platforms like Salesforce, Shopify, and QuickBooks. |
| FR0012 | User Management | Admins should be able to manage user accounts, roles, and permissions. | 10 | - Add, edit, and deactivate users. |
| - Role-based access controls. |
| FR0013 | Notifications | The system should send notifications for important updates (e.g., order status, low stock alerts, and pending invoices). | 8 | - Email and SMS notifications. |
| - Configurable notification settings for users. |
| FR0014 | Audit Logs | The system should maintain logs of all critical user activities (e.g., login, data updates, and order modifications). | 9 | - Logs include timestamp, user ID, and action details. |
| - Searchable and exportable audit logs. |
| FR0015 | Role-based Dashboards | Provide dashboards specific to user roles (Admin, Sales, Support). | 8 | - Sales: Sales pipeline and conversion metrics. |
| - Admin: User activity and inventory overview. |
| FR0016 | Data Backup and Recovery | Ensure secure data backup and recovery to prevent data loss in case of system failures. | 9 | - Scheduled daily backups. |
| - Restore points for up to 30 days. |
| FR0017 | Multi-Language Support | Allow users to access the system in multiple languages based on preferences. | 7 | - Language options: English, Spanish, French, etc. |
| - Toggle language in user settings. |
| FR0018 | Help and Support | Provide in-app help documentation and support ticketing system for users. | 8 | - Searchable FAQs. |
| - Submit and track support tickets. |

**Document 4- Requirement Traceability Matrix**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Req ID** | **Req Name** | **Req Description** | **Design** | **D1 (Development Phase 1)** | **T1 (Test Phase 1)** | **D2 (Development Phase 2)** | **T2 (Test Phase 2)** | **UAT (User Acceptance Test)** |
| FR0001 | Login | User must be able to log in to access the application. | Yes | Pending | No | Yes | Yes | YES |
| FR0002 | Centralized Database | Store and manage customer information. | Yes | Yes | No | Pending | Yes | YES |
| FR0003 | Contact Segmentation | Group contacts based on demographics and buying behavior. | Pending | No | No | Yes | Yes | Pending |
| FR0004 | Order Processing | Track orders from placement to fulfillment. | Yes | Yes | Pending | Yes | Pending | YES |
| FR0005 | Inventory Management | Track inventory levels and ensure timely order fulfillment. | Yes | Pending | No | Pending | Yes | Pending |
| FR0006 | Invoicing and Billing | Generate invoices and process payments. | Yes | Pending | No | Pending | Pending | Pending |
| FR0007 | Sales Reporting | Monitor sales performance through analytics. | Pending | No | No | Pending | Pending | Pending |
| FR0008 | Dashboard | Provide an interactive dashboard for KPIs visualization. | Yes | Yes | Yes | Yes | Pending | YES |
| FR0009 | Mobile Accessibility | Allow access and key functions on mobile devices. | Yes | Pending | Pending | Pending | Yes | YES |
| FR0010 | Integrations | Enable integration with third-party platforms. | Pending | No | No | Pending | Pending | Pending |

**Document 5- BRD Template**

**Answer:**

**Business Requirements Document (BRD)**

1. **Project Information**

|  |  |
| --- | --- |
| **Field** | **Details** |
| **Project Name** | Phyzii (CRM application) |
| **Customer Name** | [Customer Name Here] |
| **Project Sponsor** | Dr Reddys’s Lab |
| **Project Manager** | Ashitosh Rana |
| **Project Initiation Date** | 19/01/2025 |
| **Version** | 2 |

1. **Document Revisions**

|  |  |  |
| --- | --- | --- |
| **Date** | **Version Number** | **Document Change** |
|  |  |  |
|  |  |  |

1. **RACI Chart for This Document**

The RACI chart identifies the persons who need to be contacted whenever changes are made to this document. RACI stands for responsible, accountable, consulted, and informed. These are the main codes that appear in a RACI chart, used here to describe the roles played by team members and stakeholders in the production of the BRD.

Codes Used in RACI Chart

* Authorize: Has ultimate signing authority for any changes to the document.
* R: Responsible for creating this document.
* A: Accountable for accuracy of this document (for example, the project manager).
* S: Supports services in the production of this document.
* C: Consulted for input (such as an interviewee).
* I: Informed of any changes.

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Name** | **Position** | **\*** | **R** | **A** | **S** | **C** | **I** |
| Business Analyst | Responsible for Requirements |  | R |  |  | C | I |
| Project Manager | Project Oversight |  |  | A |  | C | I |
| Development Lead | Technical Guidance |  |  |  | S | C | I |
| System Architect | System Design |  |  |  | S | C | I |
| Quality Lead | Testing & Validation |  |  |  | S | C | I |
| Content Lead | Content Management |  |  |  | S | C | I |
| Business Owner | Stakeholder |  |  |  |  | A | I |
| Project Sponsor | Executive Sponsor | \* |  |  |  |  | A |

1. **Introduction**

**4.1 Business Goals**

* + **Need:** To streamline order processing, inventory tracking, and invoicing through automation while centralizing customer data for improved segmentation and communication, enhancing customer relationships and team productivity. Additionally, to deliver robust reporting and analytics with real-time data visualization for actionable insights and strategic decision-making, equip sales teams with mobile access to essential tools for increased efficiency and agility, and integrate the CRM system with existing business tools to ensure data consistency, improve operational efficiency, and foster cross-functional collaboration.

**4.2 Business Objectives**

To provide an IT solution for:

* Mobile application for Android and iOS: Develop mobile-friendly versions of CRM tools.
* Contact Management:
  + Centralized Database: Implement a centralized repository for all customer and contact data, eliminating fragmentation
  + Segmentation: Enable advanced customer segmentation to support targeted marketing and engagement strategies.
  + Communication Tools: Integrate communication tools to enhance interaction efficiency and reduce manual processes.
* Order Management:
  + Order Processing : Develop and deploy a system for automated order lifecycle management.
  + Inventory Management: Implement real-time inventory tracking to ensure stock accuracy and prevent stockouts or overstocking.
  + Invoicing and Billing: Ensure system integration with existing inventory and financial systems.
* Reporting and Analytics:
  + Sales Performance Tracking: Enable tracking of key sales metrics, including revenue and conversion rates.
  + Customizable Reports: Provide customizable reporting options tailored to departmental needs.
  + Dashboards: Develop an interactive dashboard to visualize KPIs in real time.
* Integration with third-party business applications : Integrate the CRM with marketing, e-commerce, and accounting tools.

**4.3 Business Rules**

* Maintain customer confidentiality.
* Follow regulatory compliance for data storage.
* Ensure seamless integration with existing systems.

**4.4 Background**

The project was initiated to address inefficiencies in managing contacts, orders, and sales data, improve customer engagement, and streamline reporting. By implementing this solution, the organization aims to enhance productivity and decision-making capabilities.

**4.5 Project Objective**

The primary goal is to deliver a robust, scalable IT solution addressing current operational gaps and aligning with business growth strategies.

**4.6 Project Scope**

**4.6.1 In-Scope Functionality**

* Centralized customer database
* Order and inventory management
* Analytics and reporting dashboards
* Mobile accessibility for key functionalities
* Third-party software integrations

**4.6.2 Out-of-Scope Functionality**

* Hardware procurement
* Development of non-core functionalities not related to customer or order management

**5. Assumptions**

* Stakeholders will provide timely feedback.
* Necessary infrastructure is available.
* Adequate resources will be allocated for development and testing.

**6. Constraints**

* Limited budget.
* Strict regulatory compliance for data handling.
* Integration challenges with legacy systems.

**7. Risks**

Analyze risks regularly as the project progresses. Include likelihood of occurrence, cost, and strategies (avoid, mitigate, transfer, accept).

**Technological Risks**

* Potential delays due to integration issues.

**Skills Risks**

* Limited availability of skilled resources.

**Political Risks**

* Internal disagreements on project priorities.

**Business Risks**

* Delayed ROI if project completion is postponed.

**Requirements Risks**

* Misinterpretation of business needs during requirement gathering.

**Other Risks**

* Data migration challenges.

**8. Business Process Overview**

**8.1 Legacy System (AS-IS)**

Currently, customer and order data are managed in siloed systems, leading to inefficiencies in tracking and reporting.

**8.2 Proposed Recommendations (TO-BE)**

Implement an integrated platform to centralize data management, enhance order tracking, and generate actionable insights.

**9. Business Requirements**

* **Contact Management**: Centralized database, segmentation, communication tools.
* **Order Management**: Order processing, inventory management, invoicing and billing.
* **Reporting and Analytics**: Sales performance tracking, customizable reports, dashboards.
* **Mobile Accessibility**: Access to data and functionalities via mobile.
* **Integrations**: Third-party business applications (e.g., accounting, e-commerce).

**10. Appendices**

**10.1 List of Acronyms**

* LMS: Learning Management System
* HRMS: Human Resource Management System

**10.2 Glossary of Terms**

* Centralized Database: A unified repository for all data.
* Segmentation: Categorization of data based on predefined criteria.

**10.3 Related Documents**

* Project Charter
* Technical Specifications Document