**Document 1- Business case document template**

➢ Why is this project initiated?

The project to develop and implement the LeadsEdge CRM system has been initiated to address the challenges faced by the current ERP system at MIT School of Distance Education (MITSDE). The existing ERP is outdated, lacks modern functionalities, and does not meet the evolving needs of the sales and post-sales teams. The new CRM, LeadsEdge, is designed to streamline lead management, improve communication, automate processes, and enhance the overall customer experience. The goal is to increase sales efficiency, improve data accuracy, reduce manual effort, and drive higher conversion rates, ultimately contributing to the growth and success of MITSDE.

➢ What are the current problems?

MITSDE's current ERP system faces multiple operational challenges that affect sales and administrative efficiency:

* **Lead Management Issues:**
  + Lack of lead prioritization and scoring.
  + Difficulties in tracking and managing the entire lead lifecycle.
  + Inaccurate or incomplete lead information.
* **Operational Inefficiency:**
  + Manual processes for data entry and payment tracking.
  + Slow system performance, especially with high lead volumes.
  + No automation, leading to high administrative overhead.
* **Communication Barriers:**
  + Lack of integration with communication tools such as email, WhatsApp, and SMS.
  + Delayed responses due to manual follow-ups.
* **Limited Reporting & Analytics:**
  + Insufficient reporting capabilities to make data-driven decisions.
  + Lack of actionable insights for the sales team to optimize performance.
* **User Experience:**
  + Outdated interface that is difficult to use and navigate.
  + No mobile access, limiting flexibility for the sales team.

➢ With this project how many problems could be solved?

The LeadsEdge CRM will solve the following problems:

* **Lead Management:**
  + Effective duplication prevention, ensuring each lead is unique.
  + Automatic lead assignment to counselors based on a round-robin pattern, ensuring fair distribution.
  + Prioritization of leads through lead scoring, which will help sales teams focus on high-value leads.
* **Operational Efficiency:**
  + Integration with the payment gateway to automate the mapping of payment data.
  + Automated reminders for students regarding pending documents.
  + Task automation to reduce manual entry and improve productivity.
* **Improved Communication:**
  + Integration with WhatsApp, SMS, and email, ensuring a seamless communication process.
  + Faster follow-ups and better customer engagement.
* **Enhanced Reporting & Analytics:**
  + Real-time reporting to track key performance indicators (KPIs) and support data-driven decisions.
  + Customizable dashboards and reports for better performance analysis.
* **User Experience:**
  + A modern, user-friendly interface to ensure easy adoption by the sales team.
  + Mobile access for sales teams to work efficiently on the go.

➢ What are the resources required?

To successfully implement the LeadsEdge CRM, the following resources will be required:

* **People:**
  + Project Manager (Sales Head)
  + Business Analyst (Sales Team - Shashank)
  + IT Team (External development team from the service-based company)
  + Sales Team (For user testing, feedback, and training)
  + Trainers (For comprehensive training sessions)
  + Post-Sales Team (For document verification and process adoption)
* **Technology & Infrastructure:**
  + Integration tools for payment gateway, email, SMS, and WhatsApp.
  + Hardware and mobile devices for team access.
  + Customization tools and software for reporting and dashboards.
* **Training & Support:**
  + User guides, training manuals, and FAQs.
  + Ongoing technical support for troubleshooting and system maintenance.
* **Time & Budget:**
  + Detailed project timeline (7-8 months).
  + Project budget to cover all aspects development, training, and support.

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

Adopting the LeadsEdge CRM will require significant organizational change, but it will result in improved efficiency and productivity. Key areas of change include:

* **Process Change:**
  + Sales processes will be automated, including lead assignment, follow-ups, and document verification.
  + Integration with the payment gateway will streamline financial transactions.
* **Cultural Change:**
  + Sales teams will need to embrace the new CRM system and workflows.
  + Cross-team collaboration between sales, post-sales, and accounts departments will improve, but will require proper onboarding and change management.
* **Training & Support:**
  + Sales and support teams will require training on how to use the new system.
  + Continuous learning and feedback loops will be necessary to ensure smooth adoption.

➢ Time frame to recover ROI?

The estimated time to recover ROI is **within 12 months** post-implementation. This includes:

* Improved sales efficiency through automation and better lead management.
* Increased conversion rates due to improved lead tracking, follow-ups, and communication.
* Reduced operational costs due to automation and a reduction in manual work.
* Improved customer satisfaction and faster response times leading to increased customer retention.

The CRM’s ability to streamline the sales process, automate manual tasks, and provide real-time insights will contribute to revenue growth, ensuring ROI within the first year.

➢ How to identify Stakeholders?

Stakeholders can be identified based on their interest, involvement, and impact on the CRM project. Key stakeholders for this project include:

* **Internal Stakeholders:**
  + **Sales Head:** Project sponsor and decision-maker.
  + **Business Analyst:** Facilitator of requirements gathering, project scope, and testing.
  + **Sales Team:** Primary users of the CRM for lead management, follow-ups, and customer engagement.
  + **Post-Sales Team:** Users who will verify student documents and update status in the CRM.
  + **Accounts Team:** Will use the system to track payment data integrated from the admission portal.
  + **IT Team (Service-Based):** Developers and technical support for system setup, integration, and post-launch support.
* **External Stakeholders:**
  + **Payment Gateway Providers:** Partners for integration with the CRM.

**Document 2: BA Strategy**

**As a business analyst, what are the steps that you would need to follow to complete a project**

1. **Project Initiation**: Understand objectives, scope, and stakeholders.
2. **Requirement Elicitation**: Gather detailed business, functional, and non-functional requirements.
3. **Stakeholder Analysis**: Map stakeholders, define roles and responsibilities.
4. **Solution Design**: Work with the technical team, document processes, and ensure alignment with business needs.
5. **Testing and Validation**: Facilitate UAT, track defects, and ensure requirements are met.
6. **Change Management**: Manage change requests and resolve issues.
7. **Sign-off**: Get client approval and formal sign-off on deliverables.
8. **Training and Knowledge Transfer**: Train users, provide documentation.
9. **Post-Launch Support**: Provide support and ensure a smooth handover.
10. **Closure**: Assess success, document lessons learned.

**What Elicitation Techniques to apply**

#### **Elicitation Techniques to Apply:**

The first step is to gather all necessary requirements for the CRM system. The techniques used to elicit the requirements will include:

* **Interviews**: One-on-one interviews with key stakeholders (Sales Head, Post-Sales Team, Accounts Team, IT Team) to understand their specific needs, challenges, and expectations from the CRM.
* **Workshops**: Group discussions to brainstorm requirements, document pain points, and validate expectations.
* **Surveys/Questionnaires**: For gathering data from a larger set of stakeholders or end-users to understand broad requirements and identify gaps.
* **Observation**: Shadowing users in their existing processes to identify inefficiencies and gather insights into the current workflows.
* **Document Analysis**: Reviewing existing documents (ERP, user manuals, reports) to understand current system capabilities and limitations.

**How to do Stakeholder Analysis RACI/ILS**

#### **Stakeholder Analysis:**

Identifying and understanding stakeholders is crucial to ensure proper communication and expectations. The stakeholders involved in the LeadsEdge CRM project will include both internal and external parties.

* **Internal Stakeholders**: Sales Head, Business Analyst (BA), Sales Team, Post-Sales Team, Accounts Team, IT Team (external development team)
* **External Stakeholders**: Payment Gateway Providers

#### **RACI (Responsible, Accountable, Consulted, and Informed) Matrix:**

The RACI matrix is an effective tool for clarifying roles and responsibilities in a project. Here is a simplified RACI breakdown:

| **Task/Activity** | **Sales Head** | **BA** | **Sales Team** | **Post-Sales Team** | **Development** | **LeadsEdge Vendor** | **IT Team** |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Requirement Gathering | A | R | C | C | C | C | C |
| Development | I | C | C | C | I | R | C |
| Payment Gateway Integration | I | C | I | I | A | R | C |
| UAT and Testing | C | R | R | R | I | C | C |
| Training and Documentation | I | R | R | R | I | C | C |
| Post-Implementation Support | I | C | I | R | C | R | R |

*RACI Key:*

* **R**: Responsible (executes the task)
* **A**: Accountable (final decision-maker)
* **C**: Consulted (provides input or advice)
* **I**: Informed (needs to be kept informed)

#### **ILS (Influence/Interest/Support) Matrix:**

Stakeholder prioritization will be done using an Influence vs. Interest matrix to understand who needs more focus in terms of communication and engagement.

| **Stakeholder** | **Influence** | **Interest** | **Support Level** | **Engagement Strategy** |
| --- | --- | --- | --- | --- |
| Sales Head | High | High | High | Regular updates, strategic involvement, decision-maker |
| Sales Team | Medium | High | High | Training, feedback loops, daily updates on progress |
| Post-Sales Team | Medium | Medium | Medium | Regular meetings, documentation updates |
| Accounts Team | Medium | Medium | Medium | Integration feedback, regular system updates |
| Development | High | High | High | Weekly sprint reviews, direct collaboration for technical issues |
| IT Team | Low | Low | Low | As-needed basis for integration/technical support |

**What Documents to Write**

#### **Documents to Write:**

The following documents will be created throughout the project lifecycle:

* **Business Requirements Document (BRD)**: To define high-level business requirements, objectives, and scope of the CRM system.
* **Functional Requirements Document (FRD)**: Detailed functional specifications for the CRM features, workflows, and integrations.
* **Non-Functional Requirements Document (NFRD)**: Specifications for performance, scalability, security, and usability of the CRM.
* **Data Mapping Document**: To define how data (student info, payment data, etc.) will be mapped and integrated between systems.
* **User Acceptance Testing (UAT) Plan**: Outlining the testing strategy, criteria, test cases, and scope for UAT.
* **Training Materials**: Guides, FAQs, and tutorials to train users on the CRM functionalities.
* **Change Request Forms**: For documenting any change requests that arise during the project.

**What process to follow to Sign off on the Documents**

#### **Process for Sign-off on Documents:**

1. **Document Creation**: After gathering and analyzing requirements, the BA creates the necessary documentation.
2. **Stakeholder Review**: Send the documents to relevant stakeholders for feedback and review.
3. **Feedback Collection**: Gather feedback from stakeholders and revise the documents accordingly.
4. **Formal Approval**: Once revisions are made, stakeholders sign off on the documents.

This process ensures that all requirements are captured and confirmed before moving forward to avoid miscommunication or misalignment.

**How to take Approvals from the Client/Project Owner**

To get formal approval from the client (Sales Head/Project Owner):

* **Initial Approval**: After the BA creates the BRD, FRD, and NFRD, the documents are sent to the client (Sales Head) for review and feedback.
* **Sign-off**: Once all feedback is incorporated, formal sign-off is required from the Sales Head for the documents.
* **Client Confirmation**: Before each major milestone, approval from the client (Sales Head) will be needed to confirm that the project is on track.

**What Communication Channels to establish and implement**

Establishing clear communication channels is critical for the smooth execution of the project. These channels include:

* **Regular Team Meetings**: Weekly or bi-weekly meetings with the project team to discuss progress and challenges.
* **Email**: For formal communication, document sharing, and approvals.
* **Project Management Tool (e.g., JIRA, Trello)**: For tracking tasks, progress, and timelines.
* **Instant Messaging (e.g., Slack)**: For quick updates and resolving issues in real-time.
* **Video Conferences**: For detailed discussions and review sessions.

**How to Handle Change Requests**

Change requests will be handled through a formal process:

* **Document Change Request**: Any stakeholder submitting a change request should use the Change Request Form.
* **Impact Analysis**: The BA will assess the impact of the requested change on scope, schedule, and budget.
* **Approval Process**: The BA will present the change request to the Sales Head and other key stakeholders for approval.
* **Implementation**: If approved, the change will be implemented into the project scope and timelines, and updates will be made to relevant documents.

**How to update the progress of the project to the Stakeholders**

Project progress will be communicated through:

* **Weekly Status Updates**: Email or Project Management Tool updates on the current project status, milestones achieved, and issues faced.
* **Bi-weekly**: Meetings with stakeholders to review progress, discuss upcoming tasks, and address any blockers.
* **Monthly Reports**: Formal reports summarizing the overall project health, resource usage, and timelines.

**How to take signoff on the UAT- Client Project Acceptance Form**

For User Acceptance Testing (UAT):

* **Prepare UAT Plan**: Define test cases, testing environment, and UAT criteria.
* **UAT Execution**: Execute the tests with the Sales Team and Post-Sales Team.
* **Document Results**: The results will be documented, and any issues or discrepancies will be addressed.
* **Sign-off**: Once the UAT is complete, the client will sign off on the UAT and Client Project Acceptance Form, confirming that the system meets the agreed-upon requirements.

**Document 3- Functional Specifications**

| Project Name | LeadsEdge CRM Development |
| --- | --- |
| Customer Name | MIT School of Distance Education (MITSDE) |
| Project Version | 1 |
| Project Sponsor | Management Team, MITSDE |
| Project Manager | Sales Head |
| Project Initiation Date | 06/04/2021 |

**Functional Requirement specifications:**

| **Req ID** | **Req Name** | **Req Description** | **Priority** |
| --- | --- | --- | --- |
| FR001 | Lead Capture | The system must automatically capture leads from multiple sources (e.g., website form, social media, etc.). | High |
| FR002 | Lead Scoring | The CRM must include a lead scoring system that prioritizes leads based on factors such as behavior, interaction, and potential conversion. | High |
| FR003 | Lead Assignment | The system must assign leads automatically to counselors using a round-robin pattern to ensure balanced distribution. | High |
| FR004 | Lead Status Tracking | The CRM must allow counselors to update the status of leads (e.g., Prospect, Interested, Call Back, Not Interested) based on interactions. | High |
| FR005 | Lead History | The CRM must maintain a history of all interactions (calls, emails, meetings, etc.) with each lead for tracking and reference. | Medium |
| FR006 | Payment Gateway Integration | The system must integrate with the website's payment gateway to automatically capture and update payment information for each lead. | High |
| FR007 | Payment Verification | The system must allow the accounts team to verify payment status for each student and reconcile it with student records. | High |
| FR008 | Document Tracking | The CRM must track the status of student documents (e.g., ID proof, marksheets, degree certificates) and provide reminders for pending documents. | High |
| FR009 | Document Upload | Students must be able to upload documents through the CRM portal for verification by the post-sales team. | Medium |
| FR010 | Automated Document Reminders | The system must send automated reminders via email and WhatsApp to students for pending documents. | High |
| FR011 | Document Verification | The post-sales team must be able to mark the verification status of each document as "Verified" or "Pending," and update the student's overall status. | High |
| FR012 | Communication (Email, SMS, WhatsApp) | The CRM must allow counselors to send customized communications (emails, SMS, WhatsApp) to prospective leads directly through the system. | High |
| FR013 | Communication History | The CRM must store a record of all communications (email, SMS, WhatsApp) with leads for future reference and tracking. | Medium |
| FR014 | Reporting & Analytics | The CRM must provide real-time reporting and customizable dashboards for managers to track key performance metrics, including conversion rates. | Medium |
| FR015 | KPI Tracking | The system should track and report on KPIs such as lead response time, follow-up efficiency, and sales team performance. | Low |
| FR016 | Integration with External Systems | The CRM must support integration with other systems such as the learning management system (LMS), finance systems, or third-party communication tools. | Medium |
| FR017 | User Authentication & Roles | The system must support role-based access control to ensure data privacy and limit user access based on their role. | High |

### **Non-Functional Requirements Table**

| **Req ID** | **Req Name** | **Req Description** | **Priority** |
| --- | --- | --- | --- |
| NFR001 | System Performance | The system must handle concurrent users, ensuring optimal performance without significant delays, even during high traffic periods. | High |
| NFR002 | Scalability | The system should be scalable to accommodate growth in the number of leads, students, and documents. | High |
| NFR003 | Security | The system must implement robust security measures such as encryption, multi-factor authentication, and secure data storage to protect sensitive data. | High |
| NFR004 | Availability | The CRM system should ensure 99.9% uptime, with a reliable backup solution and disaster recovery process in place. | High |
| NFR005 | Mobile Accessibility | The CRM should be fully responsive and accessible from mobile devices, ensuring functionality across smartphones and tablets. | Medium |
| NFR006 | Compliance | The system should comply with relevant data protection regulations (e.g., DPDP act 2023) to ensure privacy and security of student and financial data. | High |
| NFR007 | Data Integrity | The CRM must ensure data consistency and accuracy, particularly when syncing between the website, payment gateway, and CRM system. | High |
| NFR008 | Usability | The system should be user-friendly, with an intuitive interface that requires minimal training for counselors and administrative users. | Medium |
| NFR009 | Backup & Recovery | The system must include automated daily backups and an effective data recovery mechanism to ensure data can be restored in case of a system failure. | Medium |
| NFR010 | Response Time | The system should provide quick response times, ensuring actions such as retrieving records, submitting forms, and processing payments are done in under 3 seconds. | Medium |
| NFR011 | Interoperability | The CRM should support integration with other systems (e.g., LMS, third-party communication tools) through well-documented APIs and data exchange protocols. | Medium |

**Document 4- Requirement Traceability Matrix**

| **Req ID** | **Req Name** | **Req Description** | **Design** | **D1** | **T1** | **D2** | **T2** | **UAT** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| FR001 | Lead Duplication Prevention | Ensure effective prevention of duplicate leads in the CRM. | Yes | Done | Passed | Done | Passed | Approved |
| FR002 | Lead Assignment | Automatically assign leads to counselors using a round-robin pattern. | Yes | Done | Passed | Done | Passed | Approved |
| FR003 | Bulk Communication | Enable bulk WhatsApp and SMS capabilities via third-party integration. | Yes | Done | Passed | Done | Passed | Approved |
| FR004 | Lead Scoring | Implement lead scoring based on various factors for prioritization. | Yes | Done | Passed | Done | Passed | Approved |
| FR005 | Payment Gateway Integration | Integrate CRM with the payment gateway to streamline fee management. | Yes | Done | Passed | Done | Passed | Approved |
| FR006 | Customized Messaging | Allow counselors to send customized emails, SMS, and WhatsApp messages to leads through the CRM. | Yes | Done | Passed | Done | Passed | Approved |
| FR007 | Add New Leads | Enable counselors to add new leads manually. | Yes | Done | Passed | Done | Passed | Approved |
| FR008 | Lead Details View | Display detailed information for each lead: Name, Contact, Email, Course, Inquiry Date, Lead Score, etc. | Yes | Done | Passed | Done | Passed | Approved |
| FR009 | Document Verification Workflow | Post-sales team verifies documents and marks "Admission Confirmed" or "Document Pending" with remarks. | Yes | Done | Passed | Done | Passed | Approved |
| FR010 | Reminder Automation | Send automated reminders for pending documents via email and WhatsApp. | Yes | Done | Passed | Done | Passed | Approved |

**Document 5- BRD Template**

**LeadsEdge**

**Project001**

**V1.0**

**Shashank Hiwarkar**

##### Document Revisions………………………………………………………………………………

##### Approvals…………………………………………………………………………………………...

##### RACI Chart for This Document…………………………………………………………………

##### Codes Used in RACI Chart……………………………………………………………………..

##### RACI Chart……………………………………………………………………………………….

##### Introduction…………………………………………………………………………………………

##### 4.1 Business Goals………………………………………………………………………………..

##### 4.2 Business Objectives…………………………………………………………………………..

##### 4.3 Business Rules………………………………………………………………………………..

##### 4.4 Background…………………………………………………………………………………….

##### 4.5 Project Objective………………………………………………………………………………

##### 4.6 Project Scope………………………………………………………………………………….

##### 4.6.1 In Scope Functionality……………………………………………………………..

##### 4.6.2 Out Scope Functionality…………………………………………………………...

##### Assumptions………………………………………………………………………………………..

##### Constraints…………………………………………………………………………………………

##### Risks………………………………………………………………………………………………...

##### Technological Risks……………………………………………………………………………….

##### Skills Risks…………………………………………………………………………………………

##### Political Risks………………………………………………………………………………………

##### Business Risks…………………………………………………………………………………….

##### Requirements Risks……………………………………………………………………………….

##### Other Risks…………………………………………………………………………………………

##### Business Process Overview……………………………………………………………………...

##### 8.1 Legacy System (AS-IS)..................................................................................................

##### 8.2 Proposed Recommendations (TO-BE)..........................................................................

##### Business Requirements…………………………………………………………………………..

##### Appendices…………………………………………………………………………………………

##### 10.1 List of Acronyms……………………………………………………………………………..

##### 10.2 Glossary of Terms……………………………………………………………………………

##### 10.3 Related Documents………………………………………………………………………….

**1. Document Revisions**

| Date | Version Number | Document Changes |
| --- | --- | --- |
| 06/10/2025 | 1.0 | Initial Draft |
|  |  |  |
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|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

**2. Approval**

| Role | Name | Title | Signature | Date |
| --- | --- | --- | --- | --- |
| Project Sponsor |  |  |  |  |
| Business Owner |  |  |  |  |
| Business Owner |  |  |  |  |
| Project Manager |  |  |  |  |
| System Architect |  |  |  |  |
| Development Lead |  |  |  |  |
| User Experience Lead |  |  |  |  |
| Quality Lead |  |  |  |  |
| Content Lead |  |  |  |  |

**3. RACI Chart for This Document**

| **Name** | **Position** | **\*(Authorize)** | **R - Responsible** | **A - Accountable** | **S - Supports** | **C - Consulted** | **I - Informed** |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Business Analyst | Requirements Specialist |  | ✔️ |  | ✔️ | ✔️ |  |
| Sales Head | Project Owner | ✔️ |  | ✔️ |  | ✔️ | ✔️ |
| Development Team | Technical Implementation |  | ✔️ |  | ✔️ | ✔️ |  |
| IT Team | Internal IT Support |  |  |  | ✔️ |  | ✔️ |
| Management | Executive Sponsor | ✔️ |  | ✔️ |  |  | ✔️ |
| Stakeholders | Process Experts |  |  |  |  | ✔️ | ✔️ |

| **Activity** | **Responsible (R)** | **Accountable (A)** | **Consulted (C)** | **Informed (I)** |
| --- | --- | --- | --- | --- |
| Requirements Gathering | Business Analyst | Sales Head | Stakeholders, Development Team | Management, IT Team |
| System Design | Development Team | Sales Head | Business Analyst, IT Team | Management |
| Implementation | Development Team | Sales Head | IT Team, Business Analyst | Stakeholders |
| Testing | QA Team | Sales Head | Development Team, Business Analyst | Management, IT Team |
| Deployment | IT Team, Development Team | Sales Head | Business Analyst, QA Team | Management, Stakeholders |
| Maintenance/Support | Service-Based Company | Sales Head | IT Team, Business Analyst | Management, Stakeh |

### **4. Introduction**

The LeadsEdge CRM project is initiated to address the operational inefficiencies in MITSDE's current lead management and admission processes. By implementing this modern CRM system, the organization aims to enhance sales performance, optimize resource utilization, and improve the overall student experience.

#### **4.1 Business Goals**

The primary goal of this project is to streamline and enhance the customer relationship management (CRM) processes at MIT School of Distance Education (MITSDE). By developing an in-house CRM system, we aim to improve lead management, automate routine tasks, and ensure seamless integration with other systems like the admission portal and payment gateway. This project aspires to boost operational efficiency, enhance student engagement, and ultimately drive admissions growth.

* Expand market presence in online higher education sector
* Increase revenue from student enrollments.
* Improve customer satisfaction and student engagement.
* Streamline the student admission and verification process.
* Improve counselor efficiency and performance
* Enhance CRM capabilities for better lead management.

### **4.2 Business Objectives**

The project aims to achieve key objectives, including automating lead assignment, preventing data duplication, and enabling counselors to manage leads more effectively. It seeks to integrate payment data from the admission portal, allow post-sales teams to manage document verification efficiently, and provide counselors with communication tools for customized outreach. Furthermore, it emphasizes prioritizing leads based on scoring mechanisms and streamlining workflows for faster decision-making.

* Increase student enrollments by 20% in the next academic year.
* Improve lead conversion rate from 10% to 15% in the next 6 months
* Implement a referral program to generate 500 new leads by Q4
* Reduce response time for student inquiries from 24 hours to 6 hours within 3 months.
* Achieve a 90% satisfaction rate in student feedback surveys by year-end
* Integrate payment gateway into CRM by Q3 to automate fee verification
* Implement document verification tracking in CRM to reduce pending cases by 40% by year-end.
* Train 100% of the sales team on CRM usage within the next 2 months.
* reduce lead follow-up delays by implementing automated reminders in CRM by Q3.
* Increase average counselor lead conversion rate from 8% to 12% within 6 months.

### 

### **4.3 Business Rules**

The following business rules define the operational guidelines, constraints, and workflows for the LeadsEdge CRM system to ensure consistency, accuracy, and efficiency:

1. **Lead Management**
   * Each lead must have a unique identifier to prevent duplication.
   * Leads are assigned automatically to counselors using a round-robin algorithm.
   * Counselors can manually add new leads with mandatory fields: Name, Contact Number, Email ID, and Course.
2. **Lead Details and Status**
   * Leads must display key information, including Name, Contact Number, Email ID, Course, Date of Inquiry, Lead Score, Source of Lead, and Disposition (e.g., Prospect, Interested, Callback, Not Interested).
   * Disposition changes must be tracked and timestamped for auditing.
3. **Communication**
   * Email, WhatsApp, and SMS messages must be sent only to verified leads.
   * Bulk communication is enabled through third-party integration with logging and tracking capabilities.
   * Automated reminders are sent to students for pending actions, including document submissions.
4. **Payment Integration**
   * Payment data from the admission portal must map automatically to LeadsEdge CRM using APIs.
   * Payment statuses (e.g., Paid, Pending, Failed) must be accessible to the accounts team for verification.
5. **Document Management**
   * Students must upload the following documents: Govt ID Proof, 10th Marksheet, 12th Marksheet, Graduation Marksheet, Degree Certificate, and Experience Letter (if required).
   * The post-sales team will verify documents and update statuses as "Admission Confirmed" or "Document Pending" with remarks.
6. **Lead Scoring**
   * Lead scores are calculated based on predefined factors, such as inquiry source, level of engagement, and interactions with counselors.
   * High-priority leads are flagged for immediate follow-up.
7. **Access Control**
   * User roles must define access levels: Administrators, Counselors, Accounts Team, Post-Sales Team, and Management.
   * Sensitive information (e.g., payment details) must be accessible only to authorized personnel.
8. **Reporting and Analytics**
   * Real-time reports must be generated for conversions, counselor performance, lead sources, and payment statuses.
   * Reports must be customizable and exportable for further analysis.
9. **Task Automation**
   * Repetitive tasks, such as follow-up scheduling and reminders, must be automated.
   * Notifications must alert users to pending tasks and deadlines.
10. **Data Integrity and Security**
    * Data must be validated upon entry to prevent errors and inconsistencies.
    * All data must comply with applicable data protection regulations (e.g., DPDP).
11. **Scalability and Maintenance**
    * The system must handle up to a 30% increase in lead volume without performance degradation.
    * Technical support must be available post-launch for troubleshooting and updates.

### **4.4 Background**

MIT School of Distance Education (MITSDE) has been relying on an outdated ERP system to manage student admissions, lead tracking, and associated operations. However, the current system has several limitations that hinder the efficiency of the sales, accounts, and post-sales teams. These limitations include a lack of integration with modern communication tools, poor user interface, slow system performance, and manual processes that are prone to errors.

To address these challenges, MITSDE has decided to build a custom CRM solution LeadsEdge CRM with the help of an external IT service-based company. This new system will address the key pain points by integrating all necessary functionalities into a single platform. It will support lead management, communication integration, automated workflows, and a better user experience, ultimately improving operational efficiency and student satisfaction.

The new CRM will be integrated with the MITSDE website's payment gateway, allowing real-time mapping of student payments. It will also automate document verification processes, reducing the administrative burden on the post-sales team and improving response times to students. The system will allow both counselors and post-sales teams to collaborate more effectively, track the progress of each student, and ensure that no lead or student falls through the cracks.

By adopting the LeadsEdge CRM, MITSDE aims to enhance its overall sales process, reduce manual efforts, improve customer engagement, and streamline workflows across teams, ultimately supporting its mission of delivering quality education to a broader student base.

### **4.5 Project Objectives**

Design, develop, and implement LeadsEdge CRM for MITSDE within 8 months to enhance lead management, automate payment verification, and streamline the post-sales document verification process. The CRM will:

1. Optimize lead management by preventing duplication, automating lead assignment, and enabling bulk communication via WhatsApp and SMS.
2. Enhance sales efficiency by introducing lead scoring, automated follow-ups, and real-time tracking of lead status.
3. Integrate with the payment gateway to automate fee verification, reducing manual workload for the accounts team by 90%.
4. Simplify document verification by providing a structured tracking system for student documents and enabling automated follow-ups for pending submissions.
5. Ensure secure user access with a role-based login system using official email IDs and passwords.
6. Deliver a scalable and user-friendly CRM that reduces manual processes, improves team productivity, and enhances student experience.

### 

### **4.6 Project Scope**

The project scope outlines the key functionalities that will be included and excluded from the LeadsEdge CRM development and implementation. This will help in managing expectations and ensuring that all critical requirements are addressed while avoiding scope creep.

#### **4.6.1 In Scope Functionality**

The following functionalities are within the scope of the LeadsEdge CRM project:

1. **Lead Management**:
   * Automated lead assignment to counselors based on a round-robin pattern.
   * Lead scoring based on various factors such as interest level, lead source, and student behavior.
   * Lead tracking from inquiry to enrollment with detailed lead dispositions (Prospect, Interested, Callback, Not Interested).
   * Ability to add, update, and track leads by counselors.
2. **Payment Integration**:
   * Integration with the admission portal's payment gateway to automatically capture payment data in the CRM.
   * Ability for the accounts team to verify payment information within the CRM system.
3. **Communication Tools**:
   * Integration of email, SMS, and WhatsApp to streamline communication between counselors and leads.
   * Bulk messaging capabilities via third-party integration for communication with multiple leads.
   * Automated reminders to students regarding document submissions through email and WhatsApp.
4. **Post-Sales Activities**:
   * Document verification process with tracking of required documents (e.g., Govt ID proof, 10th/12th marksheet, degree certificate, etc.).
   * Ability to mark the status of a student's admission as either "Admission Confirmed" or "Document Pending."
   * Ability to add remarks for each student regarding the document status.
5. **Reporting and Analytics**:
   * Real-time reporting dashboards for counselors and managers to track performance and lead status.
   * Customizable reports for sales and post-sales teams, allowing for better decision-making and performance analysis.
6. **Mobile Access**:
   * A mobile-friendly version of the CRM for counselors and sales teams to access and update lead information on the go.
7. **User Interface and User Experience**:
   * Intuitive and user-friendly interface to ensure quick adoption by all team members.
   * Customizable views and dashboards to suit different roles (counselors, post-sales, and management).
8. **Training and Support**:
   * Comprehensive training for all users on CRM functionalities.
   * Ongoing post-launch support and troubleshooting by the service-based development company.

#### **4.6.2 Out of Scope Functionality**

The following functionalities are considered out of scope for this project:

1. **Customizations Beyond Initial Requirements**:
   * Any additional custom features or functionalities that are not part of the initial requirements or scope, unless identified as critical during the development phase.
2. **Integration with External Systems (Beyond Payment Gateway)**:
   * Integration with systems such as Learning Management Systems (LMS) or other financial tools is not part of the scope for this phase. Future integration with additional systems will be considered once the CRM is operational.
3. **Advanced AI/ML Features**:
   * While lead scoring will be implemented based on pre-defined factors, any advanced artificial intelligence or machine learning functionalities for predictive analytics are not included in this project.
4. **Complex Workflow Automation**:
   * Complex business process automation that goes beyond the lead management and document verification workflows (e.g., marketing automation) will not be covered in this phase.
5. **Customization for External Teams**:
   * Customizations or integrations required by external stakeholders, such as vendors or partners outside MITSDE, will be out of scope for this project.
6. **Non-CRM Related Tasks**:
   * Any operational processes or activities not directly related to CRM functions, such as payment processing or student enrollment, will not be included in this project

**5. Assumptions**

It is assumed that all necessary resources, including the development team, stakeholders, and tools, will be available throughout the project. The existing data from the legacy system will be accurate and ready for seamless migration into the new CRM. Stakeholders and team members are expected to provide timely feedback during each phase of the project. Integrations with third-party platforms, such as WhatsApp, SMS gateways, and payment gateways, will function smoothly without compatibility issues. Users will actively participate in training sessions and adapt to the new system. The organization’s IT infrastructure will fully support the CRM, and the system will comply with all regulatory and data protection requirements. Lastly, clear and uninterrupted communication will be maintained to ensure project success.

### **6. Constraints**

The following constraints have been identified for the LeadsEdge CRM project:

1. **Time Constraints**:
   * The project must be completed within a 7-8 month timeline as specified. Any delays in the development, testing, or implementation phases will need to be carefully managed to meet this deadline.
   * Time limitations may affect the scope of certain features or require prioritization of critical functionalities for the initial release.
2. **Budget Constraints**:
   * The project must be executed within the allocated budget, which includes the costs for development, training, licenses, and post-launch support.
   * Any unforeseen costs or scope changes may impact the overall budget and require approval for additional resources or adjustments.
3. **Resource Availability**:
   * The availability of the service-based development team and internal stakeholders may impact the progress of the project. Delays in their availability could affect the project’s timeline.
   * Limited involvement from MITSDE's internal IT team, due to resource constraints, could also hinder some of the technical aspects of the project, which will rely heavily on the service-based company.
4. **Third-Party Integrations**:
   * The integration with third-party services, such as the payment gateway, WhatsApp, and SMS services, depends on the availability and reliability of their APIs.
   * Any delays or issues with third-party services could impact the CRM's functionality or require adjustments to the integration plan.
5. **Data Migration**:
   * The migration of data from the existing ERP system to LeadsEdge CRM could be complex due to the volume of data and the need for data cleansing.
   * There may be potential risks associated with data integrity during the migration process, requiring thorough validation and testing.
6. **User Adoption and Training**:
   * The successful adoption of the CRM by the sales, counseling, and post-sales teams is critical. Resistance to change or lack of training could slow down the project’s progress and impact the system's effectiveness.
   * The training sessions need to be well-planned and delivered in a way that ensures all users can effectively use the new system.
7. **System Scalability**:
   * The CRM system must be scalable to handle future growth in leads, students, and data. However, there may be limitations to how quickly the system can be scaled without requiring significant rework or additional resources.
   * The scalability will also depend on the underlying infrastructure and the ability of the service-based company to adapt the system as needed.
8. **Regulatory Compliance**:
   * The system must comply with any applicable legal or regulatory requirements, such as data protection laws (e.g., DPDP or local data protection regulations), which could impose limitations on how data is stored, processed, and transferred.
   * Ensuring that the CRM adheres to these regulations may require additional development efforts or adjustments to existing workflows.
9. **Post-Launch Support**:
   * Post-launch support from the service-based company is crucial for addressing issues and bugs. There may be constraints around the availability or extent of this support, particularly if the issues are outside the scope of the original agreement.
   * MITSDE’s internal team may need to take on more responsibilities for minor issues after the initial support period ends.
10. **Change Management**:
    * The process of managing changes to the scope, functionality, or timeline of the project can present constraints, particularly if the changes require significant rework or affect the overall delivery schedule.
    * Any major changes will need to go through a formal approval process, which could result in delays or budget increases.

### **7. Risks**

The following risks have been identified for the LeadsEdge CRM project:

#### **Technological Risks**

1. **System Integration Challenges**:
   * **Risk**: Integrating LeadsEdge CRM with third-party systems, including the payment gateway and communication tools (WhatsApp, SMS, etc.), may pose challenges.
   * **Mitigation**: Conduct thorough testing of integrations during the development phase to ensure seamless functionality. Establish clear communication with third-party vendors for timely support.
2. **Data Migration Issues**:
   * **Risk**: Migrating data from the existing ERP system to LeadsEdge CRM could result in data loss, corruption, or inconsistency.
   * **Mitigation**: Perform extensive data cleansing and validation before migration. Carry out trial runs and ensure proper backup strategies are in place.
3. **Scalability and Performance**:
   * **Risk**: The CRM system may not scale effectively to handle growing lead volumes or increasing user load, potentially affecting performance.
   * **Mitigation**: Implement load testing early in the project and design the system to be scalable, leveraging cloud-based solutions where necessary. Monitor performance throughout the development phase.
4. **Security and Compliance**:
   * **Risk**: Failure to meet data security and privacy regulations, especially in handling sensitive student information, may lead to legal and reputational risks.
   * **Mitigation**: Ensure the CRM meets regulatory requirements like GDPR or local data protection laws. Work with legal and compliance teams to implement secure data handling practices.

#### **Skills Risks**

1. **Skill Gaps in Internal Teams**:
   * **Risk**: MITSDE’s internal team may lack the necessary technical expertise to fully manage or support the CRM system post-launch.
   * **Mitigation**: Provide training and workshops for the internal team to enhance their skills. Rely on the vendor for technical support in the initial phase and ensure documentation is in place for knowledge transfer.
2. **Dependency on Service-Based Company**:
   * **Risk**: Over-reliance on the external service-based company for development, customization, and support could lead to delays or quality issues.
   * **Mitigation**: Maintain regular communication and set clear expectations with the service-based company. Define performance metrics for ongoing support and development.

#### **Political Risks**

1. **Management Decision Delays**:
   * **Risk**: Changes in management priorities or delays in approvals from the leadership team could cause delays in project milestones.
   * **Mitigation**: Ensure regular alignment and check-ins with key stakeholders to confirm that the project remains a priority. Establish clear decision-making timelines.
2. **Resistance to Change**:
   * **Risk**: Employees may resist the new system, which could delay adoption and impact the project’s success.
   * **Mitigation**: Implement a comprehensive change management strategy, including training programs and user support to ease the transition to the new CRM system.

#### **Business Risks**

1. **Misalignment with Business Goals**:
   * **Risk**: The CRM system may not fully align with MITSDE’s evolving business needs, leading to missed opportunities or inefficiencies.
   * **Mitigation**: Conduct thorough business analysis during the requirement gathering phase to ensure the CRM is tailored to meet the specific needs of the sales, counseling, and post-sales teams.
2. **Cost Overruns**:
   * **Risk**: Unforeseen costs in development, customization, or third-party integrations may exceed the allocated budget.
   * **Mitigation**: Monitor the project budget closely, set clear cost expectations with the service-based company, and allocate a contingency budget for unexpected expenses.

#### **Requirements Risks**

1. **Unclear or Changing Requirements**:
   * **Risk**: Changes in the project requirements during the development phase may lead to scope creep, delays, and added costs.
   * **Mitigation**: Use a structured requirements gathering and approval process. Ensure that stakeholders provide a clear and final list of requirements before development begins. Manage scope changes using a formal change control process.
2. **Inadequate Stakeholder Engagement**:
   * **Risk**: Insufficient involvement or feedback from key stakeholders during the requirements phase could result in misunderstandings and missed functionality.
   * **Mitigation**: Ensure regular stakeholder meetings and reviews throughout the project to keep everyone aligned and engaged. Document all feedback and ensure it is incorporated into the project plan.

#### **Other Risks**

1. **Vendor Dependence for Post-Launch Support**:
   * **Risk**: Post-launch support from the service-based company may not be sufficient or timely, impacting the system’s performance.
   * **Mitigation**: Establish clear service-level agreements (SLAs) with the vendor for post-launch support and ensure ongoing communication to address any issues promptly.
2. **User Adoption Challenges**:
   * **Risk**: Users may struggle with adopting the new CRM system, impacting the overall effectiveness and utility of the tool.
   * **Mitigation**: Provide comprehensive training, resources, and user guides. Set up a support system for users to raise questions or issues and monitor usage patterns to identify areas for improvement.

### **8. Business Process Overview**

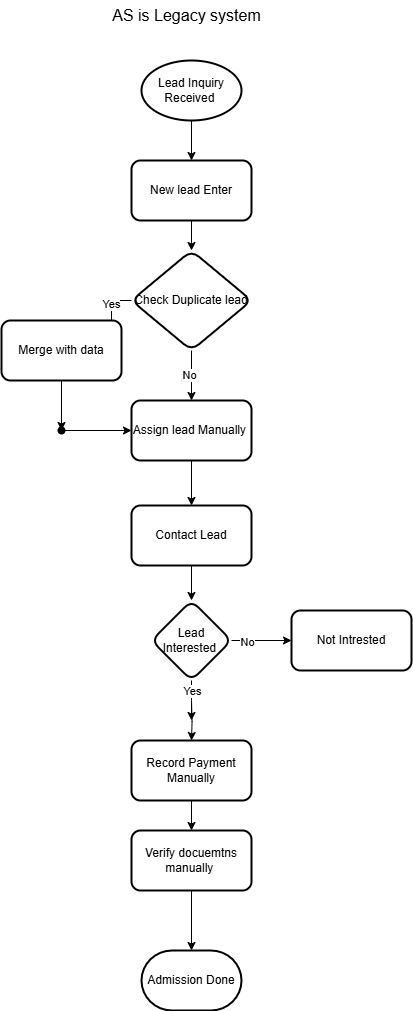
This section provides a high-level description of the current (AS-IS) processes and how the proposed LeadsEdge CRM system (TO-BE) will streamline, enhance, and improve these processes. Below, we outline the current process flow in the legacy system and the recommended improvements in the proposed system.

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

The legacy system refers to the current manual processes and outdated systems used by MITSDE for managing leads, tracking student admissions, payments, and document verification. The workflow is often fragmented, requiring manual data entry and coordination between different teams, leading to delays, errors, and inefficiencies.

##### **Process Flow in Legacy System:**

1. **Lead Generation**:
   * Leads are manually entered into a spreadsheet or a basic CRM system.
   * Leads are tracked in a non-centralized system, making it difficult for teams to access up-to-date information.
2. **Lead Qualification**:
   * Sales counselors manually qualify leads based on initial criteria (such as course interest and contact details).
   * Follow-ups are done manually through phone calls or emails.
3. **Lead Assignment**:
   * Leads are manually assigned to counselors, often based on availability or random selection.
   * There is no automated mechanism for balancing workloads or assigning leads equitably.
4. **Payment Tracking**:
   * Payments are recorded manually in the system, often requiring cross-checking with the admission portal.
   * The process of mapping payments into the system is time-consuming and error-prone.
5. **Document Verification**:
   * The post-sales team manually tracks the submission of required documents (e.g., Govt ID, marksheets).
   * Automated reminders for document submission are not available, leading to delays in document collection.
6. **Status Updates**:
   * Status updates on leads (e.g., "Admission Confirmed", "Documents Pending") are tracked manually.
   * These updates are communicated via emails or phone calls, leading to inconsistencies in information dissemination.
7. **Reporting**:
   * Reports are manually generated using spreadsheets or basic CRM reports.
   * Real-time visibility into key performance metrics (e.g., conversion rates, team performance) is limited.

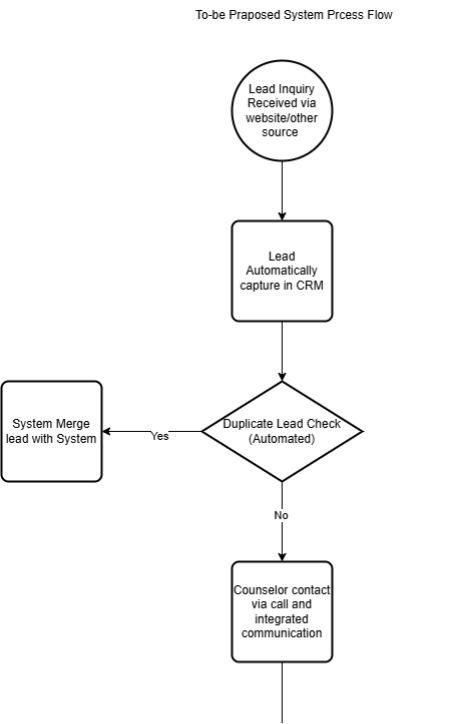


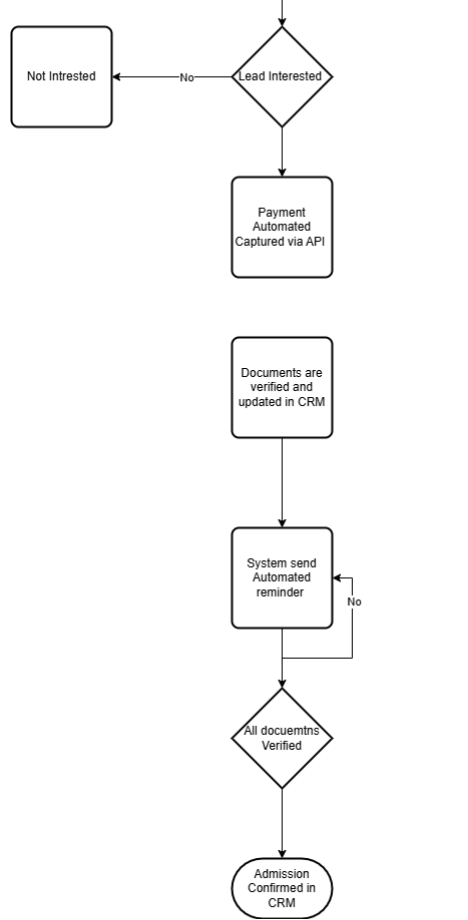
#### **8.2. Proposed Recommendations (TO-BE)**

The proposed LeadsEdge CRM system will automate and streamline the existing processes, creating a centralized platform that improves efficiency, reduces errors, and enhances team collaboration. Below is the overview of the recommended process:

##### **Process Flow in Proposed System:**

1. **Lead Generation and Data Entry**:
   * Leads will be automatically captured through the website's inquiry forms and other channels (e.g., WhatsApp, social media).
   * The CRM system will ensure that each lead is unique, preventing duplication and improving data accuracy.
2. **Lead Qualification and Scoring**:
   * Leads will be automatically scored based on various factors (e.g., inquiry source, behavior, and interest level).
   * Counselors will prioritize leads according to their scores, allowing the sales team to focus on high-potential leads first.
3. **Automated Lead Assignment**:
   * The CRM will automatically assign leads to counselors using a round-robin assignment pattern, ensuring fair distribution of leads across the team.
   * Counselors will be notified of new lead assignments and follow-up tasks via the CRM system.
4. **Payment Integration and Tracking**:
   * The CRM will integrate with the payment gateway to automatically capture payment data from the admission portal.
   * Payment statuses will be updated in real time, allowing the accounts team to verify payments directly within the CRM system, eliminating manual data entry.
5. **Document Verification**:
   * The post-sales team will track the status of required documents (e.g., Govt ID, marksheets, degree certificate) within the CRM system.
   * Automated reminders will be sent to students via email and WhatsApp for pending documents, ensuring timely submission.
6. **Lead and Document Status Updates**:
   * The CRM will automatically update the lead status to "Admission Confirmed" or "Document Pending" based on the document verification process.
   * These updates will be visible to the relevant teams (e.g., sales, post-sales) and communicated to students automatically.
7. **Reporting and Analytics**:
   * The CRM will provide real-time reports and dashboards on key metrics (e.g., lead conversion rates, payment status, team performance).
   * Managers will have access to customizable reports, enabling data-driven decision-making and better performance tracking.
8. **Communication Automation**:
   * The CRM will integrate with email, WhatsApp, and SMS platforms, enabling counselors to send personalized communications to leads.
   * Follow-ups, reminders, and updates will be automated, ensuring timely and consistent engagement with prospects.





### **How the Proposed System Addresses Legacy Challenges:**

* **Automation and Efficiency**: The CRM will automate key tasks like lead assignment, payment tracking, and document verification, significantly reducing manual effort and human error.
* **Centralized Data**: All lead, payment, and document data will be stored in one centralized system, providing easy access to all teams.
* **Improved Communication**: Automated reminders and follow-up messages will ensure timely engagement with students, improving conversion rates.
* **Better Reporting**: Real-time data and customizable reports will provide actionable insights, helping management make informed decisions.
* **Scalability**: The system will be scalable to accommodate growth in lead volume without affecting performance, ensuring that the CRM can evolve with the business.

By addressing the pain points in the legacy system, the proposed LeadsEdge CRM will enhance overall operational efficiency, improve user experience, and help MITSDE achieve its business goals.

**9. Business Requirements**

| **Req ID** | **Req Name** | **Req Description** | **Priority** |
| --- | --- | --- | --- |
| BR001 | Lead Capture | The system must automatically capture leads from multiple sources (e.g., website form, social media, etc.). | High |
| BR002 | Lead Scoring | The CRM must include a lead scoring system that prioritizes leads based on factors such as behavior, interaction, and potential conversion. | High |
| BR003 | Lead Assignment | The system must assign leads automatically to counselors using a round-robin pattern to ensure balanced distribution. | High |
| BR004 | Lead Status Tracking | The CRM must allow counselors to update the status of leads (e.g., Prospect, Interested, Call Back, Not Interested) based on interactions. | High |
| BR005 | Lead History | The CRM must maintain a history of all interactions (calls, emails, meetings, etc.) with each lead for tracking and reference. | Medium |
| BR006 | Payment Gateway Integration | The system must integrate with the website's payment gateway to automatically capture and update payment information for each lead. | High |
| BR007 | Payment Verification | The system must allow the accounts team to verify payment status for each student and reconcile it with student records. | High |
| BR008 | Document Tracking | The CRM must track the status of student documents (e.g., ID proof, marksheets, degree certificates) and provide reminders for pending documents. | High |
| BR009 | Document Upload | Students must be able to upload documents through the CRM portal for verification by the post-sales team. | Medium |
| BR010 | Automated Document Reminders | The system must send automated reminders via email and WhatsApp to students for pending documents. | High |
| BR011 | Document Verification | The post-sales team must be able to mark the verification status of each document as "Verified" or "Pending," and update the student's overall status. | High |
| BR012 | Communication (Email, SMS, WhatsApp) | The CRM must allow counselors to send customized communications (emails, SMS, WhatsApp) to prospective leads directly through the system. | High |
| BR013 | Communication History | The CRM must store a record of all communications (email, SMS, WhatsApp) with leads for future reference and tracking. | Medium |
| BR014 | Reporting & Analytics | The CRM must provide real-time reporting and customizable dashboards for managers to track key performance metrics, including conversion rates. | Medium |
| BR015 | KPI Tracking | The system should track and report on KPIs such as lead response time, follow-up efficiency, and sales team performance. | Low |
| BR016 | Integration with External Systems | The CRM must support integration with other systems such as the learning management system (LMS), finance systems, or third-party communication tools. | Medium |
| BR017 | User Authentication & Roles | The system must support role-based access control to ensure data privacy and limit user access based on their role. | High |
| BR018 | Mobile Accessibility | The CRM must be fully mobile-responsive, allowing counselors and staff to access the system on any device. | Medium |
| BR019 | Data Encryption | The CRM must use secure encryption methods to protect sensitive student data, including personal and payment details. | High |
| BR020 | Data Backup & Retention | The system must support data backup and retention capabilities to safeguard against data loss and ensure long-term data accessibility. | Low |

**10. Appendices**

**10.1. List of Acronyms**

| **Acronym** | **Definition** |
| --- | --- |
| BA | Business Analyst |
| BRD | Business Requirements Document |
| CRM | Customer Relationship Management |
| IT | Information Technology |
| ROI | Return on Investment |
| UAT | User Acceptance Testing |

**10.2. Glossary of Terms**

| **Term** | **Definition** |
| --- | --- |
| Business Analyst (BA) | A professional responsible for eliciting, analyzing, and documenting business requirements. |
| Customer Relationship Management (CRM) | A software system to manage customer interactions, data, and sales. |
| User Acceptance Testing (UAT) | A testing phase where the end-users validate the system against the requirements. |
| Stakeholders | Individuals or groups with an interest in the project or its outcomes. |
| Waterfall Methodology | A traditional software development approach with sequential phases. |

**10.3. Related Documents**

| **Document Name** | **Description** |
| --- | --- |
| Project Charter | Defines the scope, objectives, and participants of the project. |
| Functional Requirements Specification (FRS) | A detailed document outlining the functional requirements of the system. |
| Non-Functional Requirements Specification (NFRS) | Details the system's performance, security, and usability requirements. |
| Stakeholder Analysis | Identifies and analyzes the project stakeholders and their roles. |