# **Enhancement of CRM Tool**

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

**Why is this project initiated?**

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

**What are the current problems?**

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

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

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

**What are the resources required?**

**Human Resources:**

CRM Administrator  
Project Manager

Business Analyst

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

IT Developers/Consultant for integration

Testing Team

**Time:-** 3 to 5 months

**Technical Resources:**

CRM Platform Access

Existing App/website   
Internet Bandwidth  
Development and Testing tools

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

Integration tools – API’S

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

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

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

**Medium Level Change** is required:

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

**Time frame to recover ROI?**

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

**How to identify Stakeholders?**

**Stakeholders can be identified by:**

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

2. Client support Team

3. Clints

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

2. Technical team

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

**BA Approach Strategy for Completing a Project**

**1. Elicitation Techniques to Apply:**

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

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

**2. Stakeholder Analysis:**

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

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

**3. Documents to Write:**

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

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

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

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

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

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

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

**7. Handling Change Requests:**

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

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

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

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

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

**Document 3- Functional Specifications**

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

**Functional Requirement specifications:**

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

**Document 4- Requirement Traceability Matrix**

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

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

**Document 5- BRD Template**

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

**CRM-ENH-2025-01**

**V 1.0**

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