Document 1- Business case document template

➢ **Why is this project initiated?**

Sales enablement is important because it prepares salespeople to conduct a more effective sales process and achieve better sales results. The right [sales enablement](https://www.aiola.com/) strategy equips reps with the training, coaching, and content they need to be successful.

Sales Enablement Helps Sales Reps Get “Back to Basics”

Teams have gotten away from emphasizing the basics of good selling – like thorough pre-call planning, agenda-setting, call execution, consultative skills and improvisation. By placing an increased focus on effective sales onboarding, coaching and continuous learning, sales enablement functions are helping their sales reps hone these basic skills in order to have more valuable conversations in each stage of the sales process.

The wider umbrella of people who need “front-line enablement” includes the sales engineering organization, customer success, and support teams. And for companies that rely on channel partners to bring their solutions to market, your indirect sellers most certainly fall into that category

➢ What are the current problems?

Current problems in sales enablement often include a lack of alignment between sales and marketing teams, inadequate training for evolving customer needs, complex sales tools that are not fully utilized, difficulty measuring the effectiveness of enablement initiatives, inconsistent access to relevant content, and a failure to adapt to rapid technological changes, leading to potential gaps in sales rep knowledge and overall sales performance.

Key issues in sales enablement:

Siloed teams:

Poor communication and collaboration between sales and marketing teams, hindering the flow of information and impacting sales effectiveness.

Outdated content:

Not providing sales reps with current and relevant product information, customer insights, and sales strategies to address modern buyer behaviors.

Lack of personalized training:

Failing to tailor training programs to individual sales rep needs and skill levels, leading to ineffective learning.

Complex sales technology:

Difficulty navigating and utilizing the full functionality of CRM systems and other sales enablement tools, leading to frustration and inefficiency.

Poor measurement and evaluation:

Inability to accurately track and measure the impact of sales enablement initiatives, making it difficult to identify areas for improvement.

Rapid market changes:

Difficulty keeping up with evolving customer expectations, competitive landscapes, and new technologies, leading to outdated sales approaches.

Lack of ongoing support:

Not providing continuous coaching, feedback, and reinforcement to sales reps after initial training.

Poor adoption of enablement tools:

Sales reps not actively using provided tools and resources, leading to missed opportunities.

Inadequate sales readiness assessment:

Not properly identifying knowledge gaps and skill deficiencies within the sales team, resulting in ineffective training programs.

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

A sales enablement app can potentially solve a wide range of problems related to sales team efficiency, knowledge access, content delivery, coaching, and overall sales performance, including issues like inconsistent messaging, lack of product knowledge, difficulty finding relevant sales materials, poor lead qualification, inadequate training, and challenges with customer engagement, ultimately aiming to increase sales conversion rates and revenue generation.

Key problems a sales enablement app can address:

Access to information: Difficulty finding the right sales materials, product details, or customer data quickly.

Content consistency: Inconsistent messaging across the sales team due to outdated or inaccurate information.

Training and onboarding: Inefficient training processes for new sales reps, leading to slower ramp-up time.

Sales process adherence: Lack of standardized sales process, leading to missed steps and lost opportunities.

Competitive knowledge: Difficulty staying updated on competitor information and positioning.

Customer engagement: Inability to tailor communication to individual customer needs.

Sales coaching and feedback: Lack of real-time feedback and coaching for sales reps.

Performance tracking and analytics: Difficulty measuring sales rep performance and identifying areas for improvement.

Cross-team collaboration: Lack of alignment between sales and marketing teams regarding messaging and content

➢ **What are the resources required?**

To build a sales enablement app, you'll need resources including: a content management system (CMS) to store sales materials, a CRM integration to access customer data, a learning management system (LMS) for training modules, a design team to create user interfaces, developers to build the app functionality, data analysts to track usage and performance, and a sales enablement team to define content and strategy; key features may include content search, personalized recommendations, sales playbooks, pitch deck templates, training videos, and analytics dashboards.

Key components and resources:

Content Creation:

Marketing team to develop marketing collateral like case studies, whitepapers, product demos, customer testimonials.

Sales team input on required content and sales messaging.

Subject matter experts for technical information.

Technology Stack:

CMS Platform: To manage and organize sales content (e.g., WordPress, Drupal, HubSpot)

CRM Integration: To pull customer data and link it to relevant sales content

LMS (Learning Management System): For training modules and assessments

Mobile App Development Framework: To build native apps for iOS and Android (e.g., React Native, Flutter)

Development Team:

Front-end developers: To design the user interface and user experience

Back-end developers: To build the app logic and database integration

Mobile app developers (if needed)

Design Team:

UX/UI designers: To create wireframes, mockups, and ensure user-friendly design

Graphic designers: To develop visual assets for the app

Data and Analytics:

Data analysts: To track user engagement, content performance, and sales impact

Reporting tools: To visualize data and generate insights for improvement

Essential features for a sales enablement app:

Content Library: A centralized repository for all sales materials, easily searchable by keyword

Personalized Recommendations: Ability to suggest relevant content based on individual user needs and sales situations

Sales Playbooks: Structured guides for different sales scenarios with best practices and talking points

Pitch Deck Templates: Customizable presentation decks with pre-populated slides

Training Modules: Interactive training courses on product knowledge, sales techniques, and objection handling

Gamification: Incorporate game-like elements to motivate learning and engagement

Offline Access: Allow users to access content even without an internet connection

Performance Analytics: Track sales rep activity and provide feedback on their sales performance

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

A significant amount of organizational change is often required, impacting not just processes but also the company culture, as it necessitates a shift in mindset, new skills development for employees, and potentially restructuring workflows to fully leverage the technology's potential; essentially, it's a holistic transformation rather than a simple upgrade.

Key aspects of organizational change when adopting new technologies:

Cultural shift:

Moving towards a more adaptable, innovative, and learning-oriented culture that welcomes change and embraces new ways of working.

Process re-engineering:

Reviewing and modifying existing workflows to optimize the use of new technology, potentially eliminating redundant steps and streamlining operations.

Employee training and development:

Equipping employees with the necessary skills to effectively utilize new technologies, which may include digital literacy, specific software proficiency, and new work methodologies.

Leadership engagement:

Active support from leadership is crucial to champion the change, communicate its benefits, and address employee concerns.

Communication and transparency:

Clearly explaining the rationale behind the technology adoption, keeping employees informed throughout the implementation process, and actively addressing any concerns.

Factors influencing the level of organizational change:

Disruptive nature of the technology:

Radically new technologies that significantly alter existing operations will likely require more substantial changes compared to incremental improvements.

Organizational maturity:

Companies with a strong culture of continuous improvement and change management may adapt more readily to new technologies.

Employee resistance:

If employees perceive the change as a threat to their jobs or comfort level, it can lead to higher resistance and a need for more targeted change management strategies.

➢ **Time frame to recover ROI?**

The timeframe to recover ROI on a project, also known as the "payback period," varies depending on the project type, but typically falls within a range of 1-3 years for most business projects, with some longer-term investments potentially taking 5 years or more to recoup initial costs; the specific timeframe should be determined based on the project's expected cash flows and industry standards

➢ **How to identify Stakeholders?**

Review your project: Consider your project's operations and goals

Identify stakeholders: Create a list of stakeholders who are impacted by the project

Assess influence: Consider how much influence each stakeholder has on the project

Prioritize stakeholders: Rank stakeholders based on their influence and importance

Create a stakeholder map: Use a chart to visually represent stakeholders and their level of influence and interest

Analyse stakeholders: Compare stakeholders' positions and analyse their attributes

Manage expectations: Ensure stakeholders understand the project's goals and constraints

Build relationships: Foster positive relationships with stakeholders

**Document 2: BA Strategy**

In this Project we have used Prototyping (The process of creating a draft of a design or product to test how it will function) elicitation technique

While doing stakeholder analysis we have used RACI Matrix by keeping below points

1. Identify the project tasks, deliverables, and milestones
2. List all stakeholders
3. Define roles for each stakeholder
4. Assign RACI roles for each task
5. Communicate the roles and responsibilities to all stakeholders

A RACI matrix is a simple, effective means for defining project roles and responsibilities, providing a comprehensive chart of who is responsible, accountable, consulted, and informed every step of the way. To sign off on documents, we have follow a process that includes: identifying key stakeholders, distributing the document for review, gathering feedback, addressing concerns, conducting a sign-off meeting to present the final version, and obtaining formal approval from all necessary parties through signatures or electronic sign-off, ensuring all stakeholders are aware of their roles and responsibilities throughout the process

client approval can be taken by following this process, Ensure clear communication, thoroughly explain your proposed solutions, address concerns proactively, involve them in the process early on, and present a well-structured, documented proposal with quantifiable benefits that align with their business goals; always be prepared to answer questions and adapt to feedback throughout the approval process

key communication channels to establish and implement include: email, project management tools, video conferencing platforms, instant messaging apps, in-person meetings, dedicated project communication channels, regular status updates, and feedback loops

Should handle a change request by thoroughly evaluating its impact on the project, conducting a detailed analysis to understand the required changes, communicating the potential consequences to stakeholders, and working with the team to implement the change if approved, while ensuring proper documentation and updates to project specifications

Should update stakeholders on project progress by providing regular, concise, and relevant information through various channels like status reports, email updates, project management tools, and scheduled meetings, focusing on key milestones, achievements, potential risks, and next steps while tailoring communication to each stakeholder's needs and level of interest.

A User Acceptance Testing (UAT) sign off is a document that confirms that a project's test cases have been completed and that the product is ready for launch. It's a critical step in the project lifecycle

* Use a UAT sign off template to track the progress of the testing process, review the results, and ensure that the product is ready for launch
* Secure user acceptance testing sign-off by balancing professionalism with strong stakeholder relationships
* Use ready-to-use email templates to speed up the process while keeping messages clear and effective

**Document 3 Functional Requirements**

|  |  |
| --- | --- |
| Project name | Sales enablement and franchise training |
| Customer Name | Lodha Pvt ltd |
| Project Version | 1.00 |
| Project Sponsor | XYZ Pvt Ltd |
| Project Manager | M Diwakar |
| Project Initiation date | 06-02-2025 |

| **Req. ID** | **Requirement Description** | **Priority** |
| --- | --- | --- |
| FR-01 | Users must be able to log in with role-based access. | High |
| FR-02 | Sales training modules should track user progress. | High |
| FR-03 | Admins should be able to upload and manage content. | Medium |
| FR-04 | Sales playbooks should provide real-time suggestions. | Medium |
| FR-05 | Notifications for training updates should be automated. | Low |

**Document 4 Requirement Traceability Matrix (RTM)**

| **Req. ID** | **Requirement Description** | **Category** | **Design Reference** | **Development Module** | **Test Case ID** | **Status** |
| --- | --- | --- | --- | --- | --- | --- |
| FR-01 | Users must be able to log in with email and password. | Functional | UI Wireframes | Authentication Module | TC-01 | In Progress |
| FR-02 | Role-based access control (Admin, Trainer, Sales Rep). | Functional | Security Design | User Management | TC-02 | Pending |
| FR-03 | Training modules should be accessible based on user roles. | Functional | LMS Design | Training Module | TC-03 | Pending |
| FR-04 | Admins should be able to upload training content. | Functional | Content Management System | Content Upload Module | TC-04 | Not Started |
| FR-05 | System should track user progress in training. | Functional | Reporting & Analytics | Tracking System | TC-05 | Pending |
| FR-06 | Users should receive completion certificates. | Functional | Training Module | Certification System | TC-06 | Pending |
| FR-07 | Sales playbooks should be interactive and customizable. | Functional | Playbook Design | Playbook Module | TC-07 | Not Started |
| FR-08 | System should provide real-time performance tracking for users. | Functional | Analytics Design | Performance Dashboard | TC-08 | In Progress |
| FR-09 | Notifications for pending training should be sent automatically. | Functional | Notification Design | Notification System | TC-09 | Not Started |
| NFR-01 | System should support 1000+ concurrent users. | Non-Functional | Infrastructure Design | Server & Database Setup | TC-10 | Not Started |
| NFR-02 | Training videos should load within 2 seconds. | Non-Functional | Performance Optimization | Media Streaming Module | TC-11 | Pending |
| NFR-03 | 99.9% uptime for system reliability. | Non-Functional | Cloud Architecture | Server Monitoring | TC-12 | Pending |
| NFR-04 | Compliance with GDPR and data security regulations. | Non-Functional | Security & Compliance | Data Encryption | TC-13 | Pending |

**Document 5 BRD**

**1. Executive Summary**

**1.1 Project Overview**

The **Franchise Live Training and Sales Enablement** system is designed to provide sales teams with the tools, training, and resources necessary to improve sales efficiency and conversion rates. The platform will include training modules, content management, performance tracking, and real-time sales playbooks to enhance user engagement and productivity.

**1.2 Business Objectives**

* Improve franchise sales productivity and training effectiveness.
* Provide real-time access to sales materials and playbooks.
* Reduce onboarding time for new sales representatives.
* Enable performance tracking and reporting for sales teams.

**2. Business Needs**

**2.1 Problem Statement**

Sales teams often struggle with accessing the right training materials, following structured sales processes, and tracking their performance. This results in inefficiencies, lower conversion rates, and longer sales cycles.

**2.2 Opportunities**

* A **centralized** digital training platform can standardize sales enablement.
* Automated **progress tracking** can help identify performance gaps.
* AI-powered sales playbooks can improve lead conversion.

**3. Scope**

**3.1 In-Scope**

* User authentication with role-based access (Admin, Trainer, Sales Rep).
* Sales training modules with progress tracking.
* Interactive sales playbooks and content management.
* Performance tracking and reporting.
* Notifications and alerts for training updates.

**3.2 Out-of-Scope**

* Direct integration with third-party CRM tools (planned for future phases).
* Customization of training materials for each franchise (to be handled by admins manually).

**4. Stakeholders**

| **Stakeholder** | **Role** | **Responsibility** |
| --- | --- | --- |
| Project Sponsor | Senior Management | Approves project budget and timeline |
| Business Analyst | BA Team | Defines business and functional requirements |
| Sales Teams | End Users | Uses the system for training and sales enablement |
| IT Team | Development | Implements and maintains the system |
| QA Team | Testing | Ensures system functionality and reliability |

**5. Functional Requirements**

| **Req. ID** | **Requirement Description** | **Priority** |
| --- | --- | --- |
| FR-01 | Users must be able to log in with role-based access. | High |
| FR-02 | Sales training modules should track user progress. | High |
| FR-03 | Admins should be able to upload and manage content. | Medium |
| FR-04 | Sales playbooks should provide real-time suggestions. | Medium |
| FR-05 | Notifications for training updates should be automated. | Low |

**6. Non-Functional Requirements**

| **Req. ID** | **Requirement Description** | **Priority** |
| --- | --- | --- |
| NFR-01 | System should support 1000+ concurrent users. | High |
| NFR-02 | Training videos should load in less than 2 seconds. | High |
| NFR-03 | System must comply with GDPR regulations. | High |
| NFR-04 | 99.9% system uptime is required. | Medium |

**7. Assumptions & Constraints**

**7.1 Assumptions**

* All users will have access to an internet connection.
* Sales representatives will complete training within the defined timeframe.

**7.2 Constraints**

* Budget limitations may restrict advanced AI-powered features.
* The system must be deployed within [XX] months.

**8. Risks & Mitigation**

| **Risk** | **Impact** | **Mitigation Strategy** |
| --- | --- | --- |
| Low user adoption | High | Conduct training sessions for sales reps |
| Data security breaches | High | Implement end-to-end encryption |
| Delays in development | Medium | Follow strict Waterfall methodology |

**9. Success Criteria & KPIs**

* **80% user adoption** within the first three months.
* **20% improvement** in sales conversion rates.
* **Reduction in training time** for new sales reps by 30%.

**10. Approval & Sign-off**

| **Name** | **Role** | **Approval Date** |
| --- | --- | --- |
| [Project Sponsor] | Senior Management | [DD-MM-YYYY] |
| [Business Analyst] | BA Team | [DD-MM-YYYY] |
| [IT Lead] | Development | [DD-MM-YYYY] |

Would you like any modifications or additional sections?