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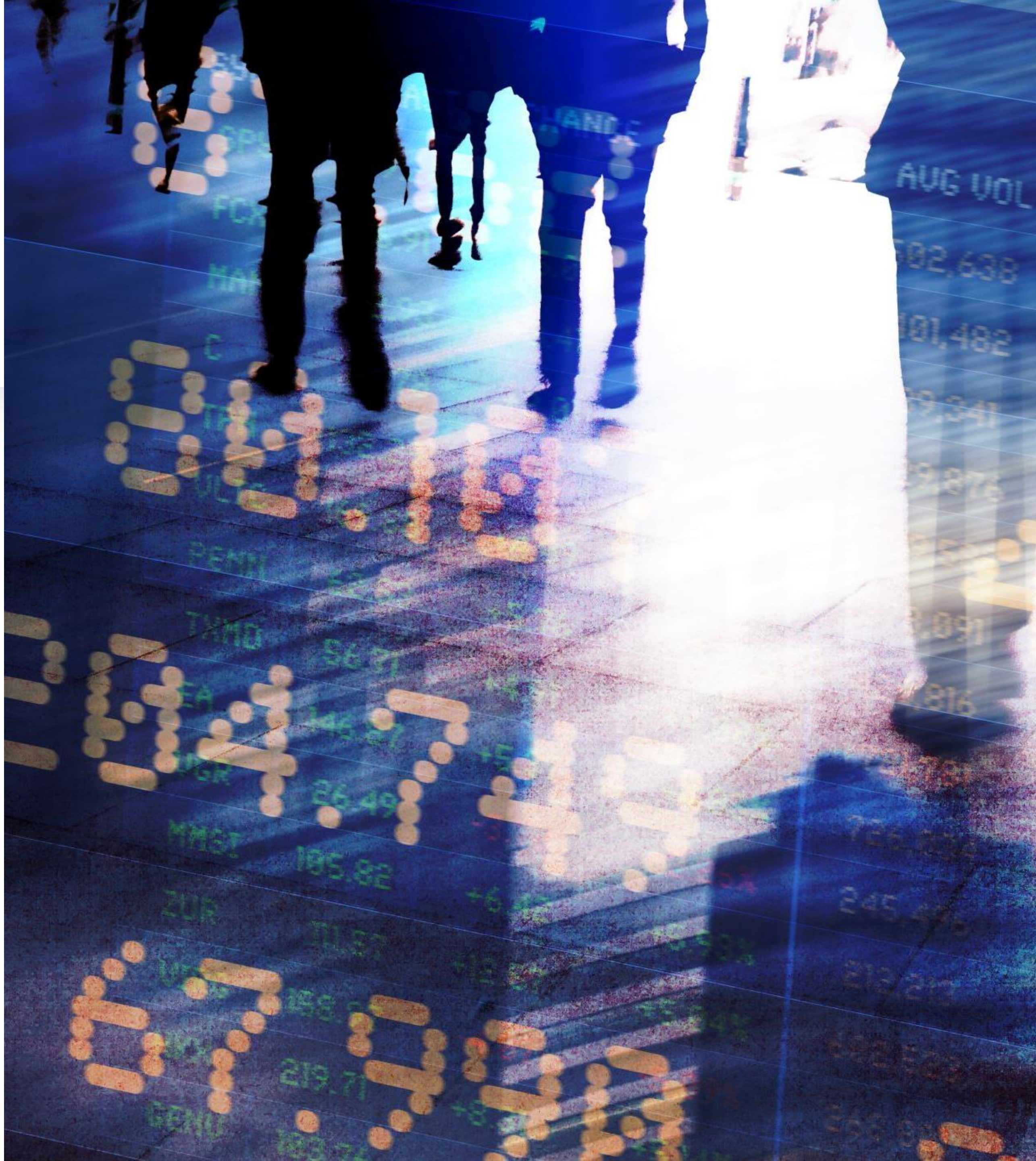
Dated – 29 may 2025

Go Global

Situation

- Title: Current Business Environment and CRM Landscape
- The company operates as a global Employer of Record (EOR), helping clients manage payroll, taxes, compliance, and employee benefits across 100+ countries.
- The existing CRM system is custom-built and used extensively by sales, onboarding, legal, HR, and finance teams to manage client and employee data.
- The CRM serves as a central repository for client interactions, contract generation, compliance workflows, and task assignments.
- With increasing international expansion and growing demand for EOR services, CRM scalability, automation, and cross-team collaboration have become critical success factors.

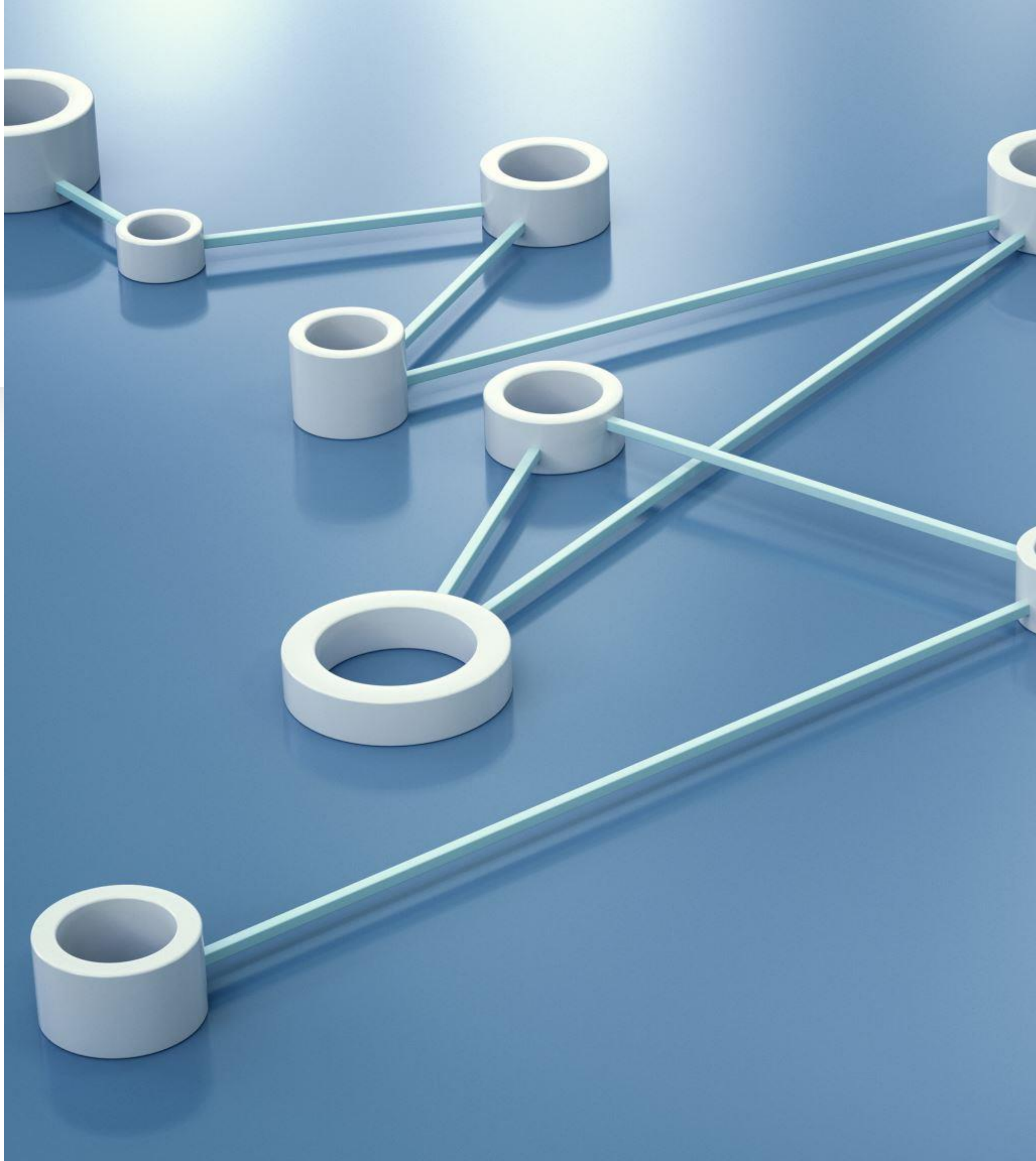


Problems

- Title: Challenges Faced with Current CRM System
- Limited Automation: Manual workflows for onboarding, document generation, and approvals increase turnaround time and human error.
- Scalability Issues: The CRM struggles to efficiently handle high volumes of multi-country client and employee data.
- Data Silos: Fragmented data sharing between departments (Sales ↔ HR ↔ Finance) leads to duplication and miscommunication.
- Lack of Real-Time Insights: Reports and dashboards are outdated or difficult to customize, affecting decision-making.
- Compliance Gaps: Inability to automatically update processes for changing country-specific laws and tax regulations introduces compliance risks.

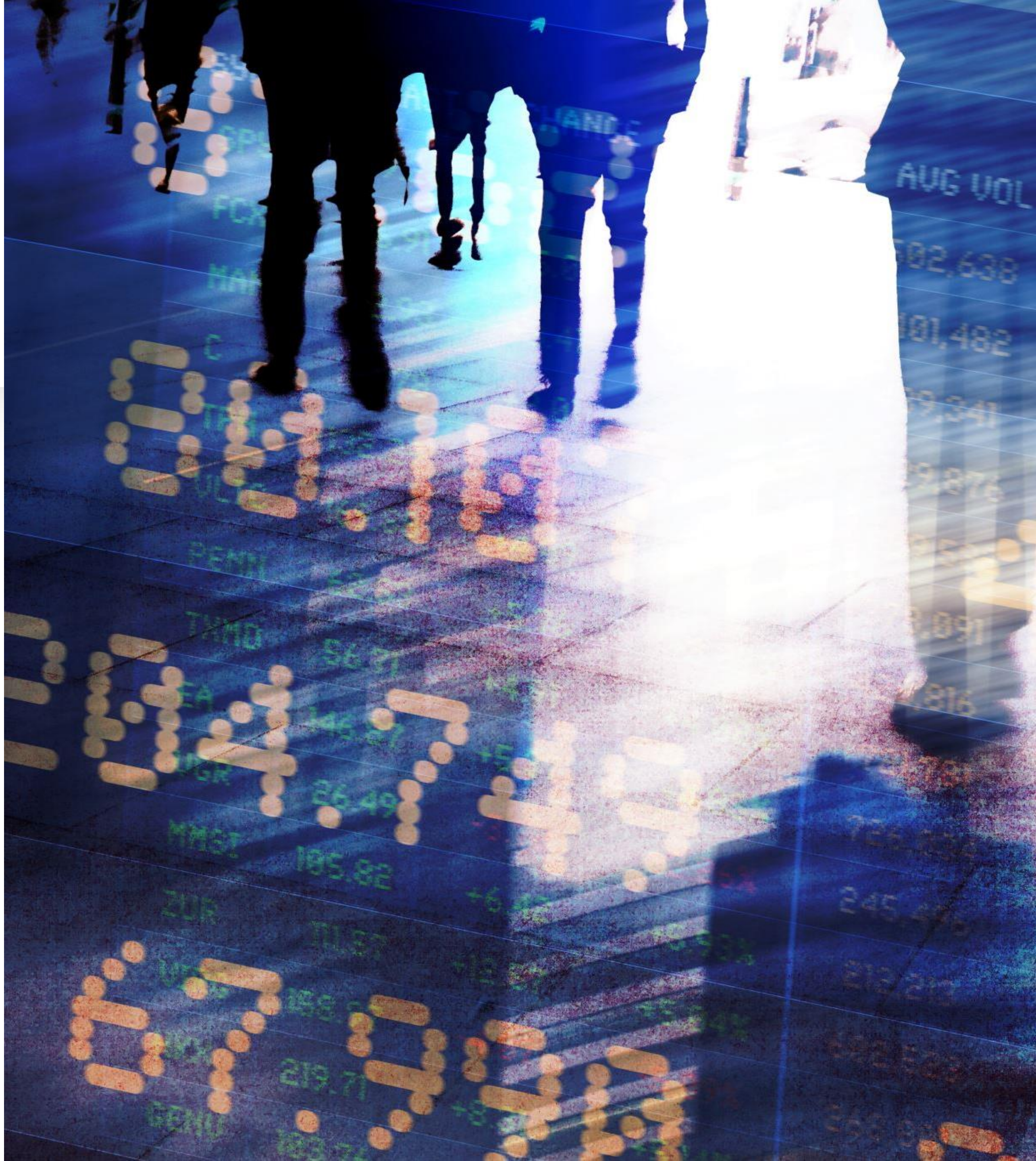
Opportunity

- Title: Strategic Opportunity for CRM Enhancement
- Process Optimization: Automating cross-functional workflows (e.g., onboarding, payroll input, contract generation) can reduce errors and save time.
- Data Centralization: Creating a unified 360° view of clients and employees enhances transparency and improves service delivery.
- Compliance Automation: Embedding rule engines to auto-update compliance workflows per country will reduce legal risks and audit preparation time.
- Enhanced Analytics: Advanced reporting and real-time dashboards will empower leadership with faster, data-driven decisions.
- Global Scale Support: Cloud-based scalability will allow the CRM to support the company’s rapid international growth and expanding client base.



Purpose Statement (Goals)

- To enhance the existing CRM platform to streamline global employment operations, increase automation, improve compliance management, and empower cross-functional teams with real-time data insights—enabling the organization to scale efficiently and deliver superior client service worldwide.



Strategic Goals

- ✅ Automate core workflows including onboarding, payroll setup, and document generation to reduce turnaround time and manual effort.
- ✅ Improve compliance adaptability by integrating rule-based updates for country-specific tax and employment laws.
- ✅ Enhance cross-departmental collaboration by centralising data across Sales, HR, Legal, and Finance.
- ✅ Deliver real-time visibility through dashboards and analytics for key operational and financial metrics.
- ✅ Ensure system scalability to support client and employee growth across 100+ countries.
- ✅ Increase client satisfaction by reducing delays, errors, and redundancies in service delivery.

Project Objective

- Primary Objective:
- To upgrade and enhance the existing CRM platform to support the end-to-end lifecycle of global employment operations—improving efficiency, compliance, and user experience for internal teams and international clients.

Specific Objective

- 🔧 Streamline and automate multi-country onboarding, contract management, and payroll-related workflows.
- 📊 Integrate advanced reporting and dashboards for real-time tracking of client statuses, compliance metrics, and service performance.
- 🌐 Enable centralised client and employee profiles for a unified view across HR, Finance, Sales, and Legal teams.
- 🔐 Strengthen data security and compliance capabilities to ensure adherence to international labor, tax, and data privacy regulations.
- ⚙️ Build scalability to handle increased data volume, multi-language/currency support, and region-specific customisations.
- 🧠 Improve user interface and experience to increase CRM adoption and reduce training overhead across global teams.

Success Criteria

- ✓ Process Efficiency
- 40% reduction in manual processing time for onboarding, document generation, and compliance checks.
- 90% of key workflows automated within the new CRM system.

- ✓ User Adoption & Experience
- 85%+ internal user adoption rate within 3 months of rollout.
- Positive feedback from 75%+ of users in post-implementation surveys.

- ✓ Compliance & Accuracy
- 100% compliance with updated country-specific regulations integrated into automated workflows.
- Zero compliance breaches in quarterly audits post-deployment.

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- ✓ Data Integration & Visibility
- Unified 360° view of clients and employees accessible across HR, Sales, Finance, and Legal teams.
- Real-time dashboards available for key performance indicators (KPI) across departments.

- ✓ Scalability & Performance
- CRM performance supports up to 2x the current number of client accounts and employee records.
- Response time for critical workflows (e.g., onboarding, payroll status) under 2 seconds.

- ✓ Stakeholder Satisfaction
- Stakeholders from each department (HR, Sales, Legal, Finance) report improved workflow alignment and communication efficiency.

Method

- Chosen Methodology:
- 🔷 Waterfall Model – A sequential and structured project management approach ideal for clearly defined requirements and regulatory-driven processes such as CRM compliance and payroll automation in EOR services

Project Approach

- Requirement Gathering:
- Conduct structured sessions with Sales, HR, Legal, and Finance teams.
- Document BRDs, FRDs, and compliance matrices.
- System Design:
- Create wireframes, data models, and workflow diagrams.
- Validate with stakeholders before development.
- Development:
- Modules built in phases (onboarding → compliance → reporting).
- Testing:
- Unit, system, integration, and UAT testing with detailed test cases.
- Deployment:
- Staged rollout with training and documentation handover.
- Maintenance:
- Post-launch support, issue tracking, and performance reviews.

Resources

- Team - 1 BA , 1 Project Management manager , 4 CRM Developers , 2 QA engineers , 1 compliance manager , 1 UX/UI Designer , 2 finance domain experts
- **Timeframe**
- Total Duration: 5 months
- Requirements & Planning – 3 weeks
- Design – 2 weeks
- Development – 10 weeks
- Testing – 3 weeks
- Deployment & Training – 2 weeks
- Post-launch Support – 2 weeks

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- **Budget Estimate**
- Total Estimated Budget: $220,000
- Personnel: $160,000
- Software Tools & Licensing: $20,000
- Training & Documentation: $15,000
- Contingency & Support: $25,000

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- **Other Resources / Tools**
- CRM Tech Stack: React, Node.js, PostgreSQL, AWS
- Tools Used:
- Jira (Project Tracking)
- Confluence (Documentation)
- Figma (UI/UX Design)
- Selenium (Automation Testing)
- Power BI / Tableau (Reporting)
- MS Teams & Slack (Collaboration)

Risks

Risk	Impact	Mitigation Strategy
Scope Creep	High	Freeze requirements post-approval; change requests through formal CR process
Regulatory Delays	Medium	Early engagement with compliance teams; maintain a legal checklist
Data Migration Issues	High	Conduct pilot migrations; validate with sandbox testing
Integration Failures (e.g., Payroll APIs)	Medium	Early technical feasibility analysis; mock testing with stubs
Low User Adoption	Medium	Involve users early; provide thorough training & support
Tight Timeline	Medium	Prioritize critical modules; build buffer time into the schedule
Resource Unavailability	Low	Plan backups for key roles; stagger involvement of SMEs

Dependencies

- **Key Dependencies**
- ✅ Stakeholder Availability: Timely participation from HR, Finance, Legal, and Sales SMEs.
- ✅ Third-Party API Providers: Payroll and compliance APIs must provide stable and timely integration documentation.
- ✅ Compliance Guidelines: Country-specific labor/tax rules must be validated and finalised before workflow development.
- ✅ IT Infrastructure: Hosting support from internal DevOps team (e.g., AWS configuration, SSO setup).
- ✅ Training Material Development: Dependent on finalised UI and workflow completion.

- To be completed by appropriate manager - Jackson
- Project Sponsor – Thomas Edison
- Project Manager – Adika

- Thank You