**Waterfall Model Documents:**

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

**1. Why is this project initiated?**

**Answer:**

This project is initiated to improve the current process:

* Streamline lead tracking, assignment, and status updates
* Enhance sales efficiency in the outdoor media advertisement sales
* Improve overall sales performance and increase revenue
* Enable data driven decisions

**What are the current problems?**

**Answer:**

The current problems are as follows:

* Leads are not systematically tracked
* Inefficiencies in follow-ups leading to missed opportunities
* Lack of visibility into lead status and progress
* Poor coordination among sales, finance, and operations teams
* Difficulties in accurate sales performance reporting

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

**Answer:**

This project aims to solve all the following problems:

* Implementing a structured lead tracking and assignment system
* Efficient lead tracking with real-time updates
* Improving data visibility and accessibility
* Proper assignment of leads to the right sales representatives
* Improved follow-up process, reducing response times
* Enhancing coordination among teams
* Enhanced analytics and reporting for better decision-making
* Seamless coordination between sales, finance, and operations teams

**What are the resources required?**

**Answer:**

The resources which are required for this project are:

* People: Project team, IT specialists, sales representatives
* Time: Estimated implementation timeline
* Budget: Costs for software, customization, training, and maintenance
* Other: Third-party software evaluation, site visits

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

**Answer:**

There is a significant organizational change needs to be implemented and it is rated:

Moderate to High Change:

* Sales teams will need training on the new system
* Process changes needs to integrated with the lead tracking system and reporting the results into daily workflows
* Change management efforts to ensure adoption and minimize resistance
* Integration with existing CRM or other enterprise tools will be required

**Time frame to recover ROI?**

**Answer:**

This will depend on factors such as:

* The implementation cost
* The increase in lead conversion rates
* Reduction in lost sales opportunities
* The improvement in sales efficiency
* Data-driven decision-making leading to better sales strategies
* The time it takes for the team to fully adopt the new system

**How to identify Stakeholders?**

**Answer:**

**Stakeholders can be identified through:**

* Analyzing existing organizational charts
* Conducting interviews with key personnel
* Identifying individuals and teams directly involved in or affected by the sales process
* Considering individuals from sales, marketing, finance, operations, and IT departments
* Identifying management who will be using the reports generated by the system

**Key stakeholder groups will include:**

* Sales teams
* Sales management
* IT department
* Finance department
* Operations department
* Executive management

**Document 2: BA Strategy**

**Based on the previous inputs answer the following questions:**

**Answer:**

**Phase 1: Initiation & Planning**

* Understand Business Needs: Identify the problems in the current lead management process.
* Define Objectives: Align system goals with business needs (tracking, assignment, reporting).
* Stakeholder Identification & Analysis: Identify key stakeholders and their roles in the project.

**Phase 2: Requirements Elicitation & Analysis**

* **Elicitation Techniques:**
  + Interviews: With sales teams, managers, and IT to understand pain points.
  + Workshops: Collaborative sessions with stakeholders to define requirements.
  + Surveys/Questionnaires: Gather feedback from sales reps on current issues.
  + Observation/Shadowing: Understand how leads are currently managed.
  + Document Analysis: Review existing lead tracking methods and reports.
* **Stakeholder Analysis (RACI Matrix & ILS Analysis):**
  + Responsible: Business Analyst, Product Owner, IT Development Team.
  + Accountable: Project Manager, Business Sponsors.
  + Consulted: Sales Team, Operations, Finance Team.
  + Informed: Senior Management, Clients (Indirect Stakeholders).

**Phase 3: Documentation & Sign-Off Process**

* **Documents to be Created:**
  + Business Requirements Document (BRD): High-level business needs.
  + Functional Requirements Specification (FRS): Detailed system functionality.
  + User Stories & Use Cases: Define user interactions with the system.
  + Process Flow Diagrams: Visual representation of lead tracking.
  + Risk Assessment & Mitigation Plan: Identify potential project risks.
* **Sign-Off Process:**
  + Conduct stakeholder review sessions.
  + Incorporate feedback and finalize documents.
  + Obtain formal approval through email or digital documentation platforms

**Phase 4: Development & Implementation**

* Work with Developers: Ensure business needs are implemented correctly.
* Testing Plan:
  + Unit Testing: Performed by developers.
  + System Integration Testing (SIT): Conducted by IT.
  + User Acceptance Testing (UAT): Conducted by end-users (sales team).

**Phase 5: Communication & Stakeholder Updates**

* Communication Channels:
  + Regular Stand-up Meetings (Scrum calls): Track project progress.
  + Stakeholder Updates: Weekly reports, email updates.
  + Project Management Tools (JIRA/Trello): Track development progress

**Phase 6: Handling Change Requests (CRs)**

* Change Request Process:
  + Document the Change Request (New lead tracking feature, report modifications, etc.).
  + Impact Analysis (Time, cost, resources, feasibility).
  + Stakeholder Approval (Business sponsors, IT, sales teams).
  + Implementation & Testing.

**Phase 7: UAT & Project Sign-Off**

* User Acceptance Testing (UAT):
  + Sales and operations teams validate that the system meets business requirements.
  + Issues are logged, addressed, and re-tested.
  + UAT Sign-Off: A formal Client Project Acceptance Form is signed by business sponsors

**Phase 8: Go-Live & Post-Implementation Review**

* Deploy the System & Train Users.
* Monitor System Performance for 3-6 months.
* Gather Feedback for Continuous Improvement.

**Document 3: Functional specifications:**

|  |  |
| --- | --- |
| **Project Name:** | Lead Management System for Advertisement Sales |
| **Customer Name:** | Times OOH |
| **Project Version:** | Version 1.0 |
| **Project Sponsor:** | Ashish (National Head of Sales ) |
| **Project Manager:** | Sumit |
| **Project Initiation Date:** | 12th November 2024 |

**Functional Requirement specifications:**

|  |  |  |  |
| --- | --- | --- | --- |
| **Req ID** | **Req Name** | **Req Description** | **Priority** |
| **FR0001** | **Login** | User should be able to securely login to the application using their assigned credentials (username and password). The system should support role-based access control. | 10 |
| **FR0002** | **Lead Capture** | The system should allow sales representatives to capture new leads, including contact information (name, company, phone, email), lead source, and initial requirements. | 10 |
| **FR0003** | **Lead Assignment** | The system should automatically assign leads to sales representatives based on predefined criteria (e.g., location, industry, product interest). Manual reassignment should also be possible. | 9 |
| **FR0004** | **Lead Status Tracking** | The system should allow sales representatives to update the status of each lead (e.g., contacted, qualified, proposal sent, closed). The system should provide a clear visual representation of the lead's progress through the sales pipeline. | 10 |
| **FR0005** | **Activity Logging** | The system should automatically log all activities related to a lead, including calls, emails, meetings, and notes. | 8 |
| **FR0006** | **Reporting & Analytics** | The system should generate reports on key performance indicators (KPIs), such as lead conversion rates, sales cycle length, and sales representative performance. Reports should be exportable in various formats (e.g., CSV, PDF). Dashboards with real time data are required. | 9 |
| **FR0007** | **CRM Integration** | The system should seamlessly integrate with the existing CRM system to ensure data consistency and avoid duplication. | 8 |
| **FR0008** | **User Management** | The system should allow administrators to manage user accounts, including creating new users, modifying user roles, and deactivating accounts. | 7 |
| **FR0009** | **Search & Filtering** | The system should provide robust search and filtering capabilities to allow users to quickly find specific leads based on various criteria (e.g., lead name, company, status, date). | 8 |
| **FR0010** | **Notification system** | The system must provide notification to the sales representatives when a new lead has been assigned. Also, the system must provide reminders for scheduled tasks, and for leads where no activity has occurred in a defined time. | 9 |

**Document 4- Requirement Traceability Matrix**

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Req ID** | | **Name** | **Req Description** | **Design** | **D1** | **T1** | **D2** | **T2** | **UAT** | **Notes/Status** |
| **FR0001** | **Login** | User should be able to securely login to the application using their assigned credentials | Yes | Pending | No | Yes | Yes | Yes | D1 pending on user role access inputs. |
| **FR0002** | **Lead Capture** | The system should allow sales representatives to capture new leads, including contact information | Yes | Yes | Yes | Yes | Yes | Yes | Implemented with standard form. Requires review of lead source custom drop down values. |
| **FR0003** | **Lead Assignment** | The system should automatically assign leads to sales representatives based on predefined Manual reassignment should also be possible. | Yes | Yes | Yes | Yes | Pending | Pending | Waiting on final approval for automated assignment logic. Integration Testing Pending on CRM. UAT is dependent on successful intergration testing. |
| **FR0004** | **Lead Status Tracking** | The system should allow sales representatives to update the status of each lead. The system should provide a clear visual representation of the lead's progress through the sales pipeline. | Yes | Yes | Yes | Yes | Yes | Yes | Visual pipeline display confirmed in UAT. |
| **FR0005** | **Activity Logging** | The system should automatically log all activities related to a lead, including calls, emails, meetings, and notes. | Yes | Yes | Yes | Yes | Pending | Pending | Activity Log Display is pending integration. UAT is dependent on integration. |
| **FR0006** | **Reporting & Analytics** | The system should generate reports on key performance indicators (KPIs), such as lead conversion rates, sales cycle length, and sales representative performance. Reports should be exportable in various formats (e.g., CSV, PDF). Dashboards with real time data are required. | Yes | Yes | Yes | Yes | Pending | Pending | Dashboard design approved. Pending on configuration of KPI definitions. UAT testing dependant on Integration testing. |
| **FR0007** | **CRM Integration** | The system should seamlessly integrate with the existing CRM system to ensure data consistency and avoid duplication. | Yes | Yes | Yes | Pending | Pending | Pending | CRM integration design completed, Implementation in progress, Test dependent on implementation. |
| **FR0008** | **User Management** | The system should allow administrators to manage user accounts, including creating new users, modifying user roles, and deactivating accounts. | Yes | Yes | Yes | Yes | Yes | Yes | Functional as requested. |
| **FR0009** | **Search & Filtering** | The system should provide robust search and filtering capabilities to allow users to quickly find specific leads based on various criteria (e.g., lead name, company, status, date). | Yes | Yes | Yes | Yes | Yes | Yes | Confirmed to meet requirements in UAT. |
| **FR0010** | **Notification system** | The system must provide notification to the sales representatives when a new lead has been assigned. Also, the system must provide reminders for scheduled tasks, and for leads where no activity has occurred in a defined time. | Yes | Yes | Yes | Yes | Pending | Pending | Notification tested successfully in unit tests, integration test pending notification triggers. UAT is dependent on integration testing. |

**Document 5- BRD Template**

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## 1. Document Revisions

|  |  |  |
| --- | --- | --- |
| **Date** | **Version** | **Document Changes** |
| 12th December 2024 | 1.1 | Initial Draft |
| 8th January 2025 | 1.2 | Changes to be made in the CRM integration |
| 22nd January 2025 | 1.3 | Updated Lead Assignment logic after stakeholder review |
| 5th February 2025 | 1.4 | Modified Reporting & Analytics section based on UAT feedback |
| 19th February 2025 | 1.5 | Resolved all high priority defects from UAT. |
| 5th March 2025 | 1.6 | Updated User Management section based on new security protocols. |
| 19th March 2025 | 1.7 | Final document after UAT sign off. |

## 2. Approvals

|  |  |  |  |
| --- | --- | --- | --- |
| **Role** | **Name** | **Title** | **Sign** |
| Project Head | Sumit |  |  |
| Project Sponsor | Ashish |  |  |
| Project Manager | Abhishek |  |  |
| Quality lead | Tanmay |  |  |

## 3. RACI Matrix

**Codes Used in RACI Chart:**

* **R (Responsible):** Person(s) responsible for executing tasks related to the document.
* **A (Accountable):** The final authority who ensures the task is completed and signs off.
* **S (Supports):** Provides supporting services to help complete the document.
* **C (Consulted):** Provides input and feedback on the document.
* **I (Informed):** Needs to be kept up to date on progress and changes.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Name/Position** | **Responsible (R)** | **Accountable (A)** | **Supports (S)** | **Consulted (C)** | **Informed (I)** |
| **IT/Project Stakeholders** |  |  |  |  |  |
| **Business Analyst (BA)** | R | A |  |  | I |
| **Project Manager (PM)** |  |  |  |  | I |
| **IT Development Team Lead** |  |  | S | C | I |
| **CRM Integration Specialist** |  |  | S | C | I |
| **Head of Sales** |  |  |  |  | I |
| **Sales Manager** |  |  |  | C | I |
| **Sales Representatives** |  |  |  | C | I |
| **Finance Department Representative** |  |  |  | C | I |
| **Operations Department Representative** |  |  |  | C | I |

## 4. Introduction

### 4.1. Business Goals:

The goal of this project is to develop a Lead Management System (LMS) that will enhance the efficiency of lead tracking, assignment, and sales conversion for advertisement site sales at Mumbai Airport. This system will streamline the sales process, improve decision-making, and increase revenue generation.

**Organization Need:**

* + - The current lead management process is manual, inefficient, and lacks transparency.
    - There is no centralized system to track leads, assign them to sales representatives, and monitor their progress.
    - The sales team needs automated workflows, reporting capabilities, and integration with existing CRM systems.
    - The company aims to increase conversion rates, reduce lead response time, and improve overall sales performance.

### 4.2. Business Objectives

The objective of this project is to **provide an IT solution** that enables the sales team to manage and track leads efficiently. The key functionalities to be developed include:

1. **Lead Management System (LMS)**
   1. Web-based & mobile-accessible lead tracking system
   2. Automated lead assignment to sales representatives
   3. Status tracking (New, In Progress, Follow-up, Closed-Won, Closed-Lost)
   4. Notification and alert system for lead updates
2. **Reporting & Analytics**
   1. Dashboard for lead conversion tracking
   2. Sales performance insights and revenue forecasting
   3. Custom report generation
3. **User Access & Security**
   1. Role-based access for Admin, Sales Reps, and Managers
   2. Secure login and authentication process
4. **Integration with CRM**
   1. Synchronization with existing CRM systems (e.g., Salesforce)
   2. Import/export functionality for lead data
5. **Future Scalability**
   1. Possible expansion to include **E-Learning Management System (LMS)** for internal training
   2. HRMS module integration for employee management

### 4.3. Business Rules

**Organization Policies, Procedures, and Rules & Regulations:**

* + **Lead Assignment Policy:** Leads must be assigned to sales representatives based on predefined criteria (e.g., location, industry, product interest).
  + **Data Security and Privacy:** All customer data must be handled in accordance with applicable data privacy regulations and security best practices.
  + **Sales Process Compliance:** Sales representatives must follow the defined sales process and update lead status in a timely manner.
  + **CRM Integration Standards:** Data integration with the CRM system must adhere to established data mapping and synchronization standards.
  + **Reporting Requirements:** Sales reports must be generated and distributed to management on a weekly/monthly basis.
  + **User Access Control:** User access to the lead management system must be based on assigned roles and permissions.
  + **Lead follow up time:** Leads must be contacted within 24 hours of capture.
  + **Data retention policy:** Lead data will be kept for a period of two years.

### 4.4. Background

The need for a streamlined lead management system arose from increasing inefficiencies in the current manual sales process. Sales representatives were facing challenges in tracking leads, resulting in missed follow-up opportunities and potential revenue loss. Management identified a lack of visibility into lead status and sales performance, hindering data-driven decision-making. Feedback from the sales team highlighted the need for a centralized system to improve coordination and communication. An initial assessment revealed that integrating with the existing CRM system could provide a more efficient and effective solution. The expected benefit of implementing the project, is increased sales, and better reporting to enable better decision making.

### 4.5. Project Objective

The objective of this project is to develop a **Lead Management System (LMS)** that will serve as a **centralized platform** for tracking, assigning, and managing sales leads efficiently. The system will **align with the company’s business goals** by streamlining the sales workflow and improving the overall productivity of the outdoor media sales team.

**High-Level Features of the Product:**

* **Lead Management Module**
  + Capturing new leads and entering relevant details (client name, contact, industry, etc.).
  + Auto-assigning leads to sales representatives based on predefined rules.
  + Updating lead status (New, In Progress, Follow-up, Closed-Lost).
* **Reporting & Analytics**
  + Real-time dashboard for monitoring lead progress and conversion rates.
  + Performance tracking of individual sales representatives.
  + Custom reports for revenue forecasting.
* **Integration with External Systems**
  + CRM integration (Salesforce, HubSpot) for seamless data synchronization.
  + Marketing automation tools for lead nurturing.
  + The system will be designed to be scalable, to allow for future integration with other systems.
* **Security & Access Control**
  + Role-based access for Admins, Sales Reps, and Managers.
  + Data encryption and audit trail for compliance.

### 4.6. Project Scope:

The Lead Management System (LMS) for Advertisement Sales at Mumbai Airport will focus on automating lead tracking, assignment, follow-ups, and reporting to enhance sales efficiency and revenue generation. This project aims to provide a centralized and structured system for managing advertisement sales leads.

**4.6.1 In-Scope Functionality**

The following functionalities will be developed and implemented in this project:

* **Lead Management Module**
* Capture and store lead details (company name, contact person, industry, budget, etc.).
* Auto-assign leads to sales representatives based on predefined criteria.
* Manual lead assignment for special cases.
* Track lead progress through various stages (New, In Progress, Follow-up, Closed-Won, Closed-Lost).
* **Sales Workflow Automation**
* Automatic notifications/reminders for follow-ups.
* Email/SMS alerts for lead updates and next actions.
* Task scheduling and appointment management for sales reps.
* **Reporting & Analytics**
* Sales pipeline dashboard for real-time monitoring.
* Lead conversion rate tracking.
* Sales representative performance analysis.
* Custom report generation for management insights.
* **User Access & Security**
* Role-based access (Admin, Sales Rep, Manager).
* Secure login with authentication controls.
* Activity logging and audit trail for compliance.
* **Integration with External Systems**
* CRM integration (Salesforce) for seamless data exchange.
* Integration with marketing tools for lead nurturing.

**4.6.2 Out-of-Scope Functionality**

The following functionalities will not be included in the initial phase of the project but may be considered for future enhancements:

* AI-based Lead Scoring (Predictive analytics for lead prioritization).
* Automated Proposal Generation (Auto-generated proposals based on lead details).
* Billing & Invoicing System (Financial transactions and invoice management).
* Full-fledged CRM System (This project focuses only on lead management, not a complete CRM solution).
* Third-party Advertising Campaign Management (Managing ad campaigns beyond lead tracking).

## 5. Assumptions

The following assumptions are made while defining the requirements and implementing the Lead Management System (LMS) for Advertisement Sales:

* **User Adoption:** Sales representatives and managers will actively use the system to track and update leads.
* **Stable Business Process:** The overall sales workflow (lead capture, assignment, follow-ups, closure) will remain unchanged during implementation.
* **Data Availability:** Accurate and up-to-date lead data will be provided by the sales team for system integration.
* **Internet & System Accessibility:** Users will have reliable internet access to use the web and mobile applications.
* **Role-Based Access Control:** Different user roles (Admin, Sales Rep, Manager) will be defined and followed.
* **CRM Integration Readiness:** External CRM systems (e.g., Salesforce, HubSpot) will be accessible for integration if required.
* **Timely Feedback from Stakeholders:** The sales team and management will provide prompt feedback for improvements and enhancements.
* **Hardware & Software Availability:** The required IT infrastructure (servers, cloud storage, licenses) will be provisioned as needed.

## 6. Constraints

The following constraints must be considered while developing the Lead Management System (LMS):

* **Budget Limitation:** The project must be completed within the allocated budget for development, deployment, and training.
* **Time Constraints:** The system must be deployed within the agreed timeframe to avoid delays in adoption.
* **Scope Limitation:** Only the defined in-scope functionalities will be implemented in this phase, with additional features planned for future versions.
* **Data Migration Challenges:** Migrating historical lead data from existing manual records or spreadsheets may require additional effort.
* **User Training Requirement:** Sales teams and managers must be trained on the new system for successful adoption.
* **Third-Party Dependencies:** Integration with external CRM or marketing platforms depends on the availability of APIs and vendor support.
* **Device & Browser Compatibility:** The system must work efficiently on different devices (desktops, mobiles) and browsers.
* **Change Management:** Resistance to new technology adoption from sales teams may require additional onboarding efforts.

## 7. Risks Analysis

7.1 Technological Risks

|  |  |  |  |
| --- | --- | --- | --- |
| **Risk** | **Likelihood** | **Impact** | **Strategy** |
| System performance issues due to high lead volume | Medium | High | **Mitigate**: Optimize system architecture and ensure scalability |
| Integration challenges with external CRM or marketing tools | High | High | **Mitigate**: Ensure API compatibility and test integrations before deployment |
| Data security vulnerabilities (breaches, unauthorized access) | High | High | **Avoid**: Implement encryption, role-based access control, and security audits |
| System downtime due to server failure | Medium | High | **Transfer**: Use cloud-based infrastructure with redundancy |

7.2 Skills Risks

|  |  |  |  |
| --- | --- | --- | --- |
| **Risk** | **Likelihood** | **Impact** | **Strategy** |
| Lack of experienced developers for LMS implementation | Medium | High | **Mitigate**: Hire skilled professionals or provide training |
| Sales team reluctance to adopt new technology | High | High | **Mitigate**: Conduct training and change management sessions |
| Limited IT support for maintenance post-deployment | Medium | High | **Mitigate**: Plan for dedicated IT support and documentation |

7.3 Political Risks

|  |  |  |  |
| --- | --- | --- | --- |
| **Risk** | **Likelihood** | **Impact** | **Strategy** |
| Changes in airport advertisement policies affecting sales strategies | Medium | High | **Accept**: Adjust sales strategy based on new policies |
| Government regulations on customer data privacy and compliance | High | High | **Avoid**: Ensure compliance with GDPR, Indian IT Act, and other regulations |
| Internal organizational changes affecting project continuity | Medium | High | **Mitigate**: Maintain project documentation and ensure knowledge transfer |

7.4 Business Risks

|  |  |  |  |
| --- | --- | --- | --- |
| **Risk** | **Likelihood** | **Impact** | **Strategy** |
| Failure to achieve expected ROI within the projected timeframe | Medium | High | **Mitigate**: Regularly review key performance metrics and optimize processes |
| System adoption resistance leading to low utilization | High | High | **Mitigate**: Conduct awareness programs and offer incentives for early adoption |
| Budget overruns leading to project delays | Medium | High | **Mitigate**: Monitor costs closely and adjust scope as necessary |

7.5 Requirements Risks

|  |  |  |  |
| --- | --- | --- | --- |
| **Risk** | **Likelihood** | **Impact** | **Strategy** |
| Misinterpretation of business requirements | High | High | **Mitigate**: Conduct thorough requirement validation with stakeholders |
| Changing requirements leading to project delays | High | High | **Mitigate**: Implement change management and approval processes |

7.6 Other Risks

|  |  |  |  |
| --- | --- | --- | --- |
| **Risk** | **Likelihood** | **Impact** | **Strategy** |
| Resistance from higher management due to cost concerns | Medium | High | **Mitigate**: Demonstrate ROI with clear data and projections |
| Competitor advancements making the system outdated | High | High | **Accept**: Plan for periodic system updates and enhancements |
| Dependence on third-party vendors for critical components | Medium | High | **Mitigate**: Have backup plans for vendor replacement or in-house solutions |

## 8. Business Process Overview

The Lead Management System (LMS) for Advertisement Sales is designed to streamline the process of managing and tracking leads, assigning them to the respective sales representatives, and updating their statuses efficiently.

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

**Current Challenges in the Legacy System:**

The existing lead management process is **manual and inefficient**, leading to multiple issues:

* **Scattered Lead Data** – Leads are recorded in spreadsheets, emails, or paper logs, making tracking difficult.
* **Lack of Real-Time Tracking** – No centralized system to monitor lead progress.
* **No Automated Assignment** – Leads are manually assigned, causing delays and inefficiencies.
* **Limited Reporting & Analytics** – Inability to generate real-time insights on sales performance.
* **High Risk of Lead Leakage** – No structured follow-up process results in missed opportunities.
* **Time-Consuming Follow-Ups** – Sales representatives manually update lead statuses.
* **Limited Collaboration** – Poor coordination between sales, operations, and finance teams.

**AS-IS Process Flow (Legacy System)**

**Step 1**: Lead information is collected via calls, emails, walk-ins, or external sources.  
**Step 2**: Leads are recorded manually in spreadsheets or noted in physical registers.  
**Step 3**: A manager manually assigns leads to sales representatives.  
**Step 4**: Sales representatives follow up on leads via calls or emails.  
**Step 5**: Updates on lead status (Interested, Not Interested, Converted, Lost) are manually recorded.  
**Step 6**: Reports are created manually by consolidating data from multiple sources.  
**Step 7**: Lead conversion tracking is inconsistent, and data-driven decision-making is difficult.

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

The proposed Lead Management System (LMS) will provide an automated and **structured approach** to lead tracking, assignment, follow-ups, and reporting.

**Key Improvements**

* **Centralized Database** – All leads will be stored in a cloud-based system, accessible in real-time.
* **Automated Lead Assignment** – Leads will be auto-assigned based on predefined criteria (e.g., location, expertise).
* **Real-Time Lead Tracking** – A dashboard will display lead statuses, ownership, and follow-up history.
* **Automated Notifications & Reminders** – Alerts for follow-ups, pending tasks, and lead updates.
* **Mobile Access** – Sales representatives can update lead status through a mobile app.
* **Advanced Reporting & Analytics** – Generate real-time insights on conversions, revenue, and sales trends.
* **Integration with CRM & Finance Systems** – Seamless data flow between lead management, CRM, and billing.
* **Role-Based Access Control** – Ensures data security and restricts unauthorized access.

**TO-BE Process Flow (Proposed System)**

**Step 1**: Leads are automatically captured from various sources (website, social media, inbound calls, walk-ins).  
**Step 2**: The system automatically assigns leads to sales representatives based on predefined rules.  
**Step 3**: Sales representatives update the lead status in the system through a web or mobile app.  
**Step 4**: Automated follow-up reminders ensure timely communication.  
**Step 5**: Managers monitor real-time dashboards to track lead progress and performance.  
**Step 6**: Reports are generated instantly, providing insights into conversion rates, revenue trends, and sales performance.  
**Step 7**: Successful leads are converted into deals and transferred to the finance team for invoicing.

|  |  |  |
| --- | --- | --- |
| **Aspect** | **AS-IS (Legacy System)** | **TO-BE (Proposed System)** |
| Lead Collection | Manual (Emails, Calls, Paper) | Automated (Website, CRM, Social Media) |
| Lead Storage | Scattered (Excel, Paper Notes) | Centralized Cloud Database |
| Lead Assignment | Manual by Manager | Auto-Assignment Based on Rules |
| Lead Tracking | Difficult, No Visibility | Real-Time Dashboard |
| Follow-Ups | Manual & Unstructured | Automated Reminders & Alerts |
| Reporting | Time-Consuming, Inaccurate | Instant Reports & Analytics |
| Collaboration | Poor Coordination | Seamless Team Communication |

## 9. Business Requirements

**9.1 Business Requirements**

**High-Priority Requirements (Critical to Business Operations)**

* **BR001 - Centralized Lead Management System**  
  The system must provide a centralized database to store and manage all leads.
* **BR002 - Automated Lead Assignment**  
  Leads should be automatically assigned to sales representatives based on predefined rules (location, expertise, priority).
* **BR003 - Lead Tracking & Status Updates**  
  Users should be able to track lead status in real time and update progress (New, Contacted, Interested, Not Interested, Converted, Lost).
* **BR004 - Follow-Up & Reminder System**  
  The system should send automated reminders for follow-ups based on predefined schedules.
* **BR005 - Dashboard & Reports**  
  The system should generate real-time reports on lead conversions, sales performance, and revenue trends.
* **BR006 - User Authentication & Role-Based Access Control**  
  Ensure secure login with role-based access (Admin, Sales, Manager).
* **BR007 - Mobile Access**  
  The system should be accessible via mobile devices for field sales representatives.

**Medium-Priority Requirements (Enhancing System Usability & Performance)**

* **BR008 - Integration with CRM & Finance System**  
  Ensure seamless integration with CRM and invoicing tools for better workflow management.
* **BR009 - Lead Source Tracking**  
  Track lead sources (website, email, social media, walk-ins) for performance analysis.
* **BR010 - Document & Collateral Management**  
  Allow uploading of proposals, contracts, and presentations within the system for easy access.
* **BR011 - Custom Filters & Search Options**  
  Users should be able to filter leads based on status, source, sales representative, and date range.
* **BR012 - Role-Based Notifications**  
  Different user roles should receive customized notifications (e.g., Sales gets follow-up alerts, Managers get performance reports).

**Low-Priority Requirements (Future Enhancements & Additional Features)**

* **BR013 - AI-Powered Lead Scoring**  
  Implement AI-based lead scoring to prioritize high-value prospects.
* **BR014 - Chatbot for Lead Qualification**  
  Integrate a chatbot to capture and qualify leads automatically from website/social media.
* **BR015 - Predictive Analytics for Sales Forecasting**  
  Use data analytics to predict future sales trends based on historical performance.
* **BR016 - Multi-Language Support**  
  Support for multiple languages for international advertisers.

**Functional Requirements** (What the system **must do**)

|  |  |  |  |
| --- | --- | --- | --- |
| **Req ID** | **Req Name** | **Req Description** | **Priority** |
| **FR0001** | **Login** | User should be able to securely login to the application using their assigned credentials (username and password). The system should support role-based access control. | 10 |
| **FR0002** | **Lead Capture** | The system should allow sales representatives to capture new leads, including contact information (name, company, phone, email), lead source, and initial requirements. | 10 |
| **FR0003** | **Lead Assignment** | The system should automatically assign leads to sales representatives based on predefined criteria (e.g., location, industry, product interest). Manual reassignment should also be possible. | 9 |
| **FR0004** | **Lead Status Tracking** | The system should allow sales representatives to update the status of each lead (e.g., contacted, qualified, proposal sent, closed). The system should provide a clear visual representation of the lead's progress through the sales pipeline. | 10 |
| **FR0005** | **Activity Logging** | The system should automatically log all activities related to a lead, including calls, emails, meetings, and notes. | 8 |
| **FR0006** | **Reporting & Analytics** | The system should generate reports on key performance indicators (KPIs), such as lead conversion rates, sales cycle length, and sales representative performance. Reports should be exportable in various formats (e.g., CSV, PDF). Dashboards with real time data are required. | 9 |
| **FR0007** | **CRM Integration** | The system should seamlessly integrate with the existing CRM system to ensure data consistency and avoid duplication. | 8 |
| **FR0008** | **User Management** | The system should allow administrators to manage user accounts, including creating new users, modifying user roles, and deactivating accounts. | 7 |
| **FR0009** | **Search & Filtering** | The system should provide robust search and filtering capabilities to allow users to quickly find specific leads based on various criteria (e.g., lead name, company, status, date). | 8 |
| **FR0010** | **Notification system** | The system must provide notification to the sales representatives when a new lead has been assigned. Also, the system must provide reminders for scheduled tasks, and for leads where no activity has occurred in a defined time. | 9 |

**Non-Functional Requirements (How the system must perform)**

* **Performance** – The system should process lead updates within **2 seconds**.
* **Security** – Must comply with **data protection laws** and have **multi-factor authentication**.
* **Scalability** – Should handle **50,000+ leads** without performance issues.
* **Reliability** – System uptime must be **99.9%** with auto-backups.
* **Usability** – The UI should be **intuitive and mobile-responsive**.

**Use cases:**

**1. U0001: Capture New Lead**

* **Actor:** Sales Representative
* **Description:** The sales representative captures a new lead by entering contact information, lead source, and initial requirements into the system.
* **Preconditions:** The sales representative is logged into the system.
* **Postconditions:** The new lead is created in the system.

**2. U0002: Automatic Lead Assignment**

* **Actor:** System
* **Description:** The system automatically assigns a new lead to a sales representative based on predefined criteria (location, industry, etc.).
* **Preconditions:** A new lead has been captured.
* **Postconditions:** The lead is assigned to a sales representative.

**3. U0003: Manual Lead Reassignment**

* **Actor:** Sales Manager
* **Description:** The sales manager manually reassigns a lead to a different sales representative.
* **Preconditions:** The sales manager is logged into the system and has appropriate permissions.
* **Postconditions:** The lead is reassigned to the new sales representative.

**4. U0004: Update Lead Status**

* **Actor:** Sales Representative
* **Description:** The sales representative updates the status of a lead (contacted, qualified, proposal sent, closed).
* **Preconditions:** The sales representative is logged into the system and has access to the lead.
* **Postconditions:** The lead status is updated in the system.

**5. U0005: Log Activity**

* **Actor:** Sales Representative
* **Description:** The sales representative logs an activity related to a lead (call, email, meeting, note).
* **Preconditions:** The sales representative is logged into the system and has access to the lead.
* **Postconditions:** The activity is recorded in the system.

**6. U0006: Generate Reports**

* **Actor:** Sales Manager/Management
* **Description:** The sales manager/management generates reports on key performance indicators (KPIs).
* **Preconditions:** The sales manager/management is logged into the system and has appropriate permissions.
* **Postconditions:** The reports are generated and displayed.

**7. U0007: Generate Dashboards**

* **Actor:** Sales Manager/Management
* **Description:** The sales manager/management views real time data dashboards.
* **Preconditions:** The sales manager/management is logged into the system, and has appropriate permissions.
* **Postconditions:** The dashboards are generated and displayed.

**8. U008: CRM Integration**

* **Actor:** System
* **Description:** The system synchronizes lead data with the existing CRM system.
* **Preconditions:** Lead data is available in the Lead Management System.
* **Postconditions:** Lead data is synchronized with the CRM system.

**9. U0009: User Management**

* **Actor:** Administrator
* **Description:** The administrator manages user accounts (create, modify, deactivate).
* **Preconditions:** The administrator is logged into the system and has appropriate permissions.
* **Postconditions:** User accounts are managed.

**10. U0010: Send Notifications**

* **Actor:** System
* **Description:** The system sends notifications to sales representatives regarding new lead assignments or task reminders.
* **Preconditions:** A lead is assigned, or a task is scheduled.
* **Postconditions:** The notification is sent to the relevant sales representative.