**Waterfall Model Documents**

**Document 1- Business case document template**

**➢ Why is this project initiated?**

**Answer:** A leading real estate company Macrotech Developers Ltd.(LODHA) is experiencing rapid growth and handling thousands of property inquiries every month. Their sales team is responsible for managing leads from multiple sources, including website forms, social media ads, through agents and direct walk-in customers.

As the business expands, the increasing volume of leads has made it challenging to track, qualify, and nurture potential buyers effectively. Sales representatives are struggling to track leads and follow-ups manually, leading to delays in response time. Additionally, the lack of a structured and user friendly system results in missed opportunities, and an overall decline in business. Creating **Lead Management System** can help overcome this situation.

**➢ What are the current problems?**

**Answer:**

Leads are not being tracked efficiently resulting in delay in follow-ups and missed opportunities.

Sales person manually maintain excel for following up with leads, leading to delays and inconsistencies.

There is no clear visibility of lead progress, making it difficult for management to measure performance.

Duplicate leads and poor lead qualification are leading to wasted efforts and decline in sales.

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

**Answer:** **Improve records availability and accessibility of information, collateral, forms, and documents with user friendly Interface** – Ensure all lead-related data is centralized, easily retrievable, and securely stored for quick access by the sales team.

* **Reduce system downtime, related wait time, and system response times** – Implement a reliable and high-performance system to ensure uninterrupted access and quick lead processing.
* **Increase Lead Conversion Rate** – Enhance lead tracking, follow-up, and engagement strategies to improve conversion rates.
* **Enhance Sales Team Efficiency** – Reduce manual effort through automation, enabling sales representatives to focus on high-priority leads.
* **Ensure Seamless Integration** – Successfully integrate the LMS system with existing CRM, marketing, and communication tools for a smooth workflow.
* **Improve Customer Experience** – Reduce response time, offer personalized follow-ups, and provide a more structured approach to customer interactions.

**➢ What are the resources required?**

**Answer:**

**People**- SME who will provide insights into real estate lead generation and process involved for Macrotech Developers Ltd. Other than this Skilled Developers (Front End and Back End), DB Admin, NW Admin, PM and BA are the people involved behind development of LMS. Since Waterfall demands thorough documentation, testing, and debugging before deployment, skilled resources are crucial.

**Time-** As Waterfall model follows sequential approach and the final delivery is done only after the completion of last stage hence Duration of 12 months is required to develop LMS as we are following Waterfall methodology and its required to complete each stage before moving to another out of which min 15% of the total time will be dedicated to BA for requirement gathering and analysis stage.

**Budget-** Total of 50 lakhs budget is minimum required as Waterfall model follows sequential structured approach where each phase is fully completed before moving to next which requires skilled resources and careful planning.

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

**Answer:** Transitioning from manual lead tracking (spreadsheets, emails, paper-based systems) to a digital LMS requires defining clear workflows for lead capture, nurturing, follow-ups, and conversions.

 **➢ Time frame to recover ROI?**

**Answer:** ROI recovered within 12–18 months after deployment (i.e., 24–30 months from project start).

Total project cost or investment = Rs. 50,00,000/-

Profit per sale (commission or margin) = **₹5 lakh per property**

Leads per year = 10,000

Conversion rate before LMS = 5% (500 sales)

Conversion rate after LMS = 10% (1000 sales)

Revenue from Higher Conversions

**Before LMS**: 500 sales × ₹5L = **₹25 crore** revenue.

**After LMS**: 1000 sales × ₹5L = **₹50 crore** revenue.

**Incremental profit** = **₹25 crore increase per year**.

Estimated savings from staff efficiency = **₹18 lakh per year** (assuming 3 employees at ₹6L/year each)

**Total financial benefit per year = ₹25 crore + ₹18 lakh = ₹25.18 crore**.

 Investment **(LMS development cost) = ₹50 lakh**.

 Time **to recover ROI = ₹50L / ₹25.18Cr**

According to calculation ROI can be covered within a month but Since revenue growth happens **gradually**-

* **First 12 months:** LMS is under development (no direct revenue impact).
* **Months 12–18:** Adoption phase, where efficiency improves but conversion are gradual in Real Estate and depends on different conditions.
* **Months 18–24:** Full impact on sales and cost savings realized.

**➢ How to identify Stakeholders?**

**Answer:**

Using ILS technique, we can Identify, list and summarize the list of complete business stakeholders list.

Also we can use RACI matrix technique to identify who all are the Responsible, accountable, Consulted and Informed persons during the project.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Business Stakeholders |  |  |  |  |  |
| S.No. | Name  | Position | BRD | MOCKUP | Test PLAN | Project Plan |
| 1 | Mr. LODHA | Owner-Sponsor | A | I | I | A |
| 2 | Mr.Anant | Finance Head | C | I | I | C |
| 3 | Mr. Tikam | CEO | A | A | A | R |
| 4 | Mr. Jaiswal | Project Head | C | C | C | C |
| 5 | Ms. Payal | Lodha Closing Head | R | C | C | C |
| 6 | Mr.Kishore | Sourcing Head | C | C | C | C |
| 7 | Mr.Vikas | Site MIS Team | R | R | R | I |
| 8 | Mr.Sudhanshu | Marketing Head | I | R | R | I |
| Project Stakeholders |  |  |  |  |  |
| S.No. | Name | Position | BRD | MOCKUP | Test Plan | Project Plan |
| 1 | Mr. Jain | Delivery Head | A | I | I | A |
| 2 | Mr. Vaibhav | Project Manager | R | A | A | R |
| 3 | Mrs. Jaya | Sr. Java Developer | C | R | C | C |
| 4 | Mr. Prashant | Java Developer | C | R | C | I |
| 5 | Mr. Vibhor | Java Developer | C | R | C | I |
| 6 | Mr. Tutu | Network Admin | I | I | C | I |
| 7 | Mr. Rakshit | DB Admin | C | C | R | I |
| 8 | Mr. Rohit | Tester | I | C | R | I |
| 9 | Mr. Vikas | Tester | I | C | R | I |

**Document 2: BA Strategy**

**Answer:**

BA approach strategy:

**1) Stakeholder analysis:**

Using ILS technique:

Identify stakeholders, list down stake holders, Stakeholders summary.

Carry out RACI Matrix to identify who are the Responsible, accountable, Consulted and informed stakeholders.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Business Stakeholders** |  |  |  |  |  |
| S.No. | Name  | Position | BRD | MOCKUP | Test PLAN | Project Plan |
| 1 | Mr. LODHA | Owner-Sponsor | A | I | I | A |
| 2 | Mr.Anant | Finance Head | C | I | I | C |
| 3 | Mr. Tikam | CEO | A | A | A | R |
| 4 | Mr. Jaiswal | Project Head | C | C | C | C |
| 5 | Ms. Payal | Lodha Closing Head | R | C | C | C |
| 6 | Mr.Kishore | Sourcing Head | C | C | C | C |
| 7 | Mr.Vikas | Site MIS Team | R | R | R | I |
| 8 | Mr.Sudhanshu | Marketing Head | I | R | R | I |
| **Project Stakeholders** |  |  |  |  |  |
| S.No. | Name | Position | BRD | MOCKUP | Test Plan | Project Plan |
| 1 | Mr. Jain | Delivery Head | A | I | I | A |
| 2 | Mr. Vaibhav | Project Manager | R | A | A | R |
| 3 | Mrs. Jaya | Sr. Java Developer | C | R | C | C |
| 4 | Mr. Prashant | Java Developer | C | R | C | I |
| 5 | Mr. Vibhor | Java Developer | C | R | C | I |
| 6 | Mr. Tutu | Network Admin | I | I | C | I |
| 7 | Mr. Rakshit | DB Admin | C | C | R | I |
| 8 | Mr. Rohit | Tester | I | C | R | I |
| 9 | Mr. Vikas | Tester | I | C | R | I |

**Requirement gathering:**

What Elicitation Techniques to apply:

For this project **Brainstorming technique** can be used as from this session we can get detailed information about the requirement and in brainstorming sessions, we can include all the business stakeholders and generate ideas. Apart from this **Observation and Document Analysis** also can be used along as Observation will help to understand the needs while observing work environment and process flows while Document Analysis will also help us to understand about process where we will get to study series of documents, emails, reports exchanges between stakeholders.

**What Documents to Write:**

1) BRD

2) FRD

3) SRS

4) Product backlog

**How to do requirement analysis:**

* Sorting the gathered requirement
* Prioritising the requirements
* Validating the requirements.

**Requirement Analysis:**

* UML diagrams – Use case & Activity diagram
* Prepares FR’s from Business requirements.
* All architects will come up with technical requirements (SSD)
* SRS will have functional requirements and technical requirements.
* Taking sign off from client.
* Preparing RTM & SRS before starting of designing phase.

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

* Organize the project documents.
* Prepare the final report.
* Distribute the sign-off sheet.
* Transition remaining items to a to-do list.
* Review your lessons learned.

**How to take Approvals from the Client:**

Approval can be taken in the following format.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Role** | **Name**  | **Title** | **Signature** | **Date** |
| Owner-Sponsor | Mr. LODHA |   |   |   |
| Finance Head | Mr.Anant |   |   |   |
| CEO | Mr. Tikam |   |   |   |
| Project Head | Mr. Jaiswal |   |   |   |
| Lodha Closing Head | Ms. Payal |   |   |   |
| Sourcing Head | Mr.Kishore |   |   |   |
| Site MIS Team | Mr.Vikas |   |   |   |
| Marketing Head | Mr.Sudhanshu |   |   |   |

**What Communication Channels to establish and implement:**

For business communication:

3W rules of communication can be followed

What, Who, When.

**Communication can be of 2 types:**

Verbal communication:

* Oral communication
* Written communication.

Non- verbal communication:

**How to Handle Change Requests**

As the project processes through time it is inevitable that some things will change, and so the requirements may also change. Whenever a change request comes from the client, first thing will be to analyse the change request.

1) Initially BA performs Feasibility Study to accept the Change

2) Then the impact analysis to measure change to project.

3) and finally effort estimation to measure change to the project.

**Whenever a change requirement comes following can be followed.**

1) Documenting the change request.

2) Analyse it is really a change or defect discovered from previous needs.

3) If BA needs to move ahead with the requested change the change manager or the project manager must provide an initial approval.

4) Identify whether the requested change is a complex one or just a minor change.

5) In case the change is complex, it will not only expand the scope of the project but will also increase the delivery time.

6) BA will help the stakeholders to understand the impact, the change request will have on the organization and to help minimize the negative impact.

7) Successful change efforts necessitate the Business Analyst to articulate a realistic or convincing vision that appeals to both internal and external stakeholders.

Along with above following documents can be maintained.

1) Change tracker.

2) Change request log.

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

Weekly or fortnightly updates can be communicated with the client. Also BA will keep updating on each and every stage of the client to the stakeholders.

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

User Acceptance Testing (UAT) is a type of testing performed by the end user or the client to verify/accept the software system before moving the software application to the production environment. UAT is done in the final phase of testing after functional, integration and system testing is done.

UAT is the last phase of the software testing process. During UAT, actual software users test the software to make sure it can handle required tasks in real-world scenarios, according to specifications.

UAT Sign–off: When all defects are resolved, the UAT team formally accepts the software application as developed. The approval shows that the application meets user requirements and is deployable.

**Document 3- Functional Specifications**

|  |  |
| --- | --- |
| Project name | Lead Management System |
| Customer name | Macrotech Developers Ltd. |
| Project Version | V1 |
| Project Sponsor | Mr. LODHA |
| Project Head | Mr. Abhishesh Jaiswal |
| Project Initiation date | 01.03.2025 |

**Functional Requirement specifications:**

|  |  |  |  |
| --- | --- | --- | --- |
| **Req ID** | **Req Name** | **Req Description** | **Priority (1-10)** |
| FR-001 | Lead Registration | The system shall allow agents to register new leads by entering contact details, property preferences, and source of inquiry. | **10** |
| FR-002 | Lead Categorization | The system shall categorize leads as Hot, Warm, or Cold based on predefined criteria such as budget, intent, and engagement level. | **8** |
| FR-003 | Lead Assignment | The system shall automatically assign leads to sales agents based on predefined rules like location, agent availability, or property type. | **9** |
| FR-004 | Lead Follow-up Scheduling | The system shall allow agents to schedule follow-up calls, meetings, and emails with leads. | **8** |
| FR-005 | Lead Status Tracking | The system shall enable agents to update the status of leads (e.g., Contacted, Interested, Not Interested, Converted, Lost). | **9** |
| FR-006 | Lead Communication Log | The system shall maintain a history of all communications (calls, emails, messages) between agents and leads. | **7** |
| FR-007 | Property Matching | The system shall suggest properties to leads based on their preferences and budget. | **7** |
| FR-008 | Lead Nurturing | The system shall send automated emails or messages to engage leads who have not responded for a defined period. | **6** |
| FR-009 | Reports & Analytics | The system shall generate reports on lead conversion rates, agent performance, and marketing effectiveness. | **8** |
| FR-010 | Integration with CRM | The system shall integrate with an existing CRM to sync lead data and interactions. | **6** |
| FR-011 | Role-Based Access Control | The system shall provide different access levels for agents, managers, and administrators. | **9** |
| FR-012 | Document Management | The system shall allow agents to upload and manage documents related to leads, such as ID proofs or financial documents. | **7** |
| FR-013 | Lead Duplication Check | The system shall check for duplicate lead entries based on phone number and email. | **8** |
| FR-014 | Notifications & Alerts | The system shall send notifications for follow-ups, new lead assignments, and status changes. | **7** |
| FR-015 | Data Export & Import | The system shall allow exporting and importing lead data in CSV or Excel formats. | **6** |
| FR-016 | Lead Source Tracking | The system shall track the source of leads (website, social media, referrals, etc.) to measure campaign performance. | **7** |

**Document 4- Requirement Traceability Matrix**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Req ID** | **Req Name** | **Requirement Gathering** | **System Design** | **Development** | **Testing** | **Deployment** | **Maintenance** |
| **FR-001** | Lead Registration | Yes | Yes | Yes | Yes | Yes | Yes |
| **FR-002** | Lead Categorization | Yes | Yes | Yes | Yes | Yes | Yes |
| **FR-003** | Lead Assignment | Yes | Yes | Yes | Yes | Yes | Yes |
| **FR-004** | Lead Follow-up Scheduling | Yes | Yes | Yes | Yes | Yes | Yes |
| **FR-005** | Lead Status Tracking | Yes | Yes | Yes | Yes | Yes | Yes |
| **FR-006** | Lead Communication Log | Yes | Yes | Yes | Yes | Yes | Yes |
| **FR-007** | Property Matching | Yes | Yes | Yes | Yes | Yes | Yes |
| **FR-008** | Lead Nurturing | Yes | Yes | Yes | Yes | Yes | Yes |
| **FR-009** | Reports & Analytics | Yes | Yes | Yes | Yes | Yes | Yes |
| **FR-010** | Integration with CRM | Yes | Yes | Yes | Yes | Yes | Yes |
| **FR-011** | Role-Based Access Control | Yes | Yes | Yes | Yes | Yes | Yes |
| **FR-012** | Document Management | Yes | Yes | Yes | Yes | Yes | Yes |
| **FR-013** | Lead Duplication Check | Yes | Yes | Yes | Yes | Yes | Yes |
| **FR-014** | Notifications & Alerts | Yes | Yes | Yes | Yes | Yes | Yes |
| **FR-015** | Data Export & Import | Yes | Yes | Yes | Yes | Yes | Yes |
| **FR-016** | Lead Source Tracking | Yes | Yes | Yes | Yes | Yes | Yes |

**SHIVAM MEHROTRA**

**Document 5- BRD Template**



**<LEAD MANAGEMENT SYSTEM >**

**<LMD001BRDV1D1>**

**<V1>**

**<SHIVAM MEHROTRA>**

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# Document Revisions

|  |  |  |
| --- | --- | --- |
| Date | Version Number | Document Changes |
| 01.03.2025 | 0.1 | Initial Draft |
|  |  |  |
|  |  |  |

# Approvals

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Role** | **Name**  | **Title** | **Signature** | **Date** |
| Owner-Sponsor | Mr.LODHA |   |   |   |
| Finance Head | Mr.Anant |   |   |   |
| CEO | Mr.Tikam |   |   |   |
| Site Head | Mr.Jaiswal |   |   |   |
| Lodha Closing Head | Ms.Payal |   |   |   |
| Sourcing Head | Mr.Kishore |   |   |   |
| Site MIS Team | Mr.Vikas |   |   |   |
| Marketing Head | Mr.Sudhanshu |   |   |   |

# RACI Chart for This Document

The RACI chart identifies the persons who need to be contacted whenever changes are made to this document. RACI stands for responsible, accountable, consulted, and informed. These are the main codes that appear in a RACI chart, used here to describe the roles played by team members and stakeholders in the production of the BRD. They are adapted from charts used to assign roles and responsibilities during a project. (RACI can be made for IT side [Project stakeholder] as mentioned above, apart from that, it can also be made for Client side [Business Stakeholder]).

The following describes the full list of codes used in the table:

### Codes Used in RACI Chart

R Responsible Responsible for creating this document.

 A Accountable Accountable for accuracy of this document
 (for example, the project manager)

C Consulted Provides input (such as an interviewee).

I Informed Must be informed of any changes.

###

### RACI Chart

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Business Stakeholders** |  |  |  |  |  |
| S.No. | Name  | Position | BRD | MOCKUP | Test PLAN | Project Plan |
| 1 | Mr. LODHA | Owner-Sponsor | A | I | I | A |
| 2 | Mr.Anant | Finance Head | C | I | I | C |
| 3 | Mr. Tikam | CEO | A | A | A | R |
| 4 | Mr. Jaiswal | Project Head | C | C | C | C |
| 5 | Ms. Payal | Lodha Closing Head | R | C | C | C |
| 6 | Mr.Kishore | Sourcing Head | C | C | C | C |
| 7 | Mr.Vikas | Site MIS Team | R | R | R | I |
| 8 | Mr.Sudhanshu | Marketing Head | I | R | R | I |
| **Project Stakeholders** |  |  |  |  |  |
| S.No. | Name | Position | BRD | MOCKUP | Test Plan | Project Plan |
| 1 | Mr. Jain | Delivery Head | A | I | I | A |
| 2 | Mr. Vaibhav | Project Manager | R | A | A | R |
| 3 | Mrs. Jaya | Sr. Java Developer | C | R | C | C |
| 4 | Mr. Prashant | Java Developer | C | R | C | I |
| 5 | Mr. Vibhor | Java Developer | C | R | C | I |
| 6 | Mr. Tutu | Network Admin | I | I | C | I |
| 7 | Mr. Rakshit | DB Admin | C | C | R | I |
| 8 | Mr. Rohit | Tester | I | C | R | I |
| 9 | Mr. Vikas | Tester | I | C | R | I |

# Introduction

## Business Goals

The goal of the Lead Management System (LMS) is to streamline, organize, and optimize the process of capturing, tracking, and converting leads with user friendly interface in the real estate industry reducing manual effort and improving sales performance.

## Business Objectives

To develop and implement Lead Management System to automate Lead tracking management, to enhance Sales team productivity and to improve Lead conversion rates.

## Business Rules

As a solution tech company we apply industry-best practices, data-driven lead distribution, and continuous innovation to maximize conversions and expand into new real estate segments.

**Background**

The increasing volume of leads has made it challenging for Macrotech Developers Ltd.(LODHA) to track, qualify, and nurture potential buyers effectively. Sales representatives are struggling to track leads and follow-ups manually, leading to delays in response time. Additionally, the lack of a structured and user friendly system results in missed opportunities, and an overall decline in business.

## Project Objective

To develop and implement Lead Management System to automate lead tracking management and mitigate manual process.

## Project Scope

## The project scope covers development and implementation of Lead Management System to meet evolving business needs in real estate firm due to observed high traffic of leads.

### In Scope Functionality

* Streamlining manual lead tracking processes with automated workflows for efficient management.
* Implementing features as per the specifications outlined in the requirement documents.
* Providing maintenance and support services remotely for up to one-year post-implementation.

### Out Scope Functionality

* The system will not generate leads but will manage and track incoming leads from various sources.
* Email marketing, social media advertising, and other lead acquisition strategies are not part of the system.
* The LMS is designed to integrate with existing CRMs but will not function as a full-fledged CRM.
* No in-person agent training or on-site technical assistance will be provided; support will be remote only.

# Assumptions

* All leads must have complete and accurate details before being uploaded into the system.
* Users must have valid email IDs and contact information for system registration and communication.
* Users are expected to have fundamental knowledge of document uploading and system navigation.
* The project requirements will be clearly defined at the beginning, with minimal changes during the development lifecycle.
* Business stakeholders will be available for reviews and approvals at each stage as per the project timeline.
* The system will include a predefined period of post-launch support to address any critical issues.

# Constraints

* Any changes after the requirement finalization will require formal approvals and may impact timelines.
* The accuracy and completeness of lead information depend on users entering valid details.
* The system can integrate only with predefined platforms
* Support and maintenance will be provided for a fixed period (up to 1 year remotely), with additional support requiring a separate agreement.
* Each phase must be completed before progressing to the next, limiting flexibility for mid-phase modifications.
* Reports and dashboards will be based on available system data, and custom reporting may require additional configurations.

# Risks

 A *risk* is something that could affect the success or failure of a project. Analyse risks regularly as the project progresses. While you may not be able to avoid every risk, you can limit each risk’s impact on the project by preparing for it beforehand. For each risk, you’ll note the likelihood of its occurrence, the cost to the project if it does occur, and the strategy for handling the risk. Strategies include the following:

* **Avoid:** Do something to eliminate the risk.
* **Mitigate:** Do something to reduce damage if risk materializes.
* **Transfer:** Pass the risk up or out to another entity.
* **Accept:** Do nothing about the risk. Accept the consequences.

## Technological Risks

This subsection of “Risk Analysis” specifies new technology issues that could affect the project.

* High traffic or server failures may lead to slow response times or unavailability.
* Poor infrastructure planning may impact scalability and user experience.

## Skills Risks

This subsection of “Risk Analysis” specifies the risk of not getting staff with the required expertise for the project.

## Political Risks

This subsection of “Risk Analysis” identifies political forces that could derail or affect the project.

## Business Risks

This subsection of “Risk Analysis” describes the business implications if the project is cancelled.

* Difficulty in integrating with external CRMs (e.g., Salesforce) or third-party tools
* Leads may be entered incorrectly, leading to duplicate or unreliable data.
* Sales teams may resist transitioning from manual processes to the new system.
* Poor data validation processes can impact decision-making.

## Requirements Risks

This subsection of “Risk Analysis” describes the risk that you have not correctly described the requirements. List areas whose requirements were most likely to have been incorrectly captured.

## Other Risks

In this subsection of “Risk Analysis,” document any other risks not covered in the prior subsections.

# Business Process Overview

As the business expands for LODHA, the increasing volume of leads has made it challenging to track, qualify, and nurture potential buyers effectively. Sales representatives are struggling to track leads and follow-ups manually, leading to delays in response time. Additionally, the lack of a structured and user friendly system results in missed opportunities, and an overall decline in business. Creating Lead Management System can help overcome this situation.

## Legacy System (AS-IS)

The current (AS-IS) lead management process is largely manual, leading to inefficiencies, data inconsistencies, and missed opportunities and lack reporting and insights. As a result, conversion ratio is declining.

## Proposed Recommendations (TO-BE)

To overcome the inefficiencies of the legacy system, the proposed **Lead Management System (TO-BE)** will introduce automation, standardization, and improved tracking mechanisms.



#  9.Business Requirements

* User should be able to register themselves on the LMS.
* The system should be able capture leads from multiple sources.
* Lead data should be stored in a centralized database with secure access controls.
* The system should classify and prioritize leads based on predefined criteria.
* User should be automatically assigned leads based on workload, expertise, or location.
* Sales teams should be able to track lead interaction
* User should get automated reminders and notifications to ensure timely follow-ups.

# Appendices

## List of Acronyms

## Glossary of Terms

## Related Documents