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| **Project "CRM Implementation"****Problem/Opportunity Statements**P: Different and diversified customer databases.P: Low quality of data.P: Unfinished dependent projects including data warehouse, planning tools and core business application.O: Will enable individual risk management and customized offers (cross-selling)O: Segmentization of customers**Objectives**ABC Financial Services shall study, configure and implement XYZ CRM system by April of 2013. The project scope shall consist of the following features:Table

|  |  |
| --- | --- |
| Feature ID | Feature Description |
| F 1.0 | Call center module |
| F 2.0 | Business intelligence module |
| F 3.0 | Campaign management module |
| F 4.0 | Direct marketing module |
| F 5.0 | Data warehouse integration |
| F 6.0 | Data cleanup |
| F 7.0 | Updates to the standard operating procedures |
| F 8.0 | Training |

**ROM Budget and Schedule**Budget - $1,500,000 +/- 750,000Timeline - 2 +/- 0.5 years**Importance Factors**Scope and Quality - 30%, Budget - 50%, Time - 20%**Project Feasibility**The CRM Implementation project is expected to generate the following benefits for the ABC Financial Services:1. Company is expecting to increase its revenues via cross-sell and upsell capabilities resulting from this venture
2. Company is expecting an improvement in the levels of customer service
3. Company is expecting an increase in the number of products offered to the customers

**Stakeholder Register**Table

|  |  |
| --- | --- |
| Title | Name |
| President and CEO | Clayton Bring |
| VP Marketing | Hugh Mery |
| Project Manager | Serena Didomenico |
| VP IT | Roslyn Mussman |
| Director, Finance | Alejandra Vendetti |
| Director, Sales | Sofia Tacker |
| Director, Human Resources | Max Litz |

**Risks**Table

|  |  |
| --- | --- |
| Risk ID | Risk Description |
| R1 | Resources could be pulled off the project |
| R2 | Scope of the project is not well-defined |
| R3 | A lot of interdependencies between various scope items  |

**Assumptions**Table

|  |  |
| --- | --- |
| Assumption ID | Assumption Description |
| A1 | It is assumed that project "CRM Implementation" shall have access to the right resource pool |

**Constraints**Table

|  |  |
| --- | --- |
| Constraint ID | Constraint Description |
| C1 | Limited resources |
| C2 | Budget is capped at $2,250,000 |
| C3 | Updated SOP and Training must be delivered in order for this project to succeed |

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