Requirements Specifications

CRM System Implementation

**Version 0.2**

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# Revision History Table

Table 1

|  |  |  |  |
| --- | --- | --- | --- |
| Version Number | Version Date | Added By: | Revision Description |
| 0.1 | 01-Jun-2011 | JM | Document created |
| 0.2 | 13-Jun-2011 | JM | Added detailed features and requirements |

# Sign-Off Matrix

Table

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

# Introduction

## Document Purpose

This document is the Requirements Specification for the "CRM Implementation” project. It addresses intended audiences, scope, user classes and detailed requirements of the future product. The RS document is a configuration item and must be placed under change control once agreed. Updates to the RS must be reviewed and approved by the Project Manager and any relevant stakeholders for the section that is changed.

## Intended Audience

This document is intended for the following audiences:

* Project manager
* Senior architect
* Senior designer
* Technical team members - developers, testers, SOP and training analysts
* Users of all categories - represented by the members of each department involved
* Business stakeholders - see "Stakeholder register" section in the Project Charter

The rest of the Requirements Specification document contains the overview of the project scope and any relevant reference documents. The next section describes key product features, user classes and the product environment. Finally, the document focuses on the detailed requirements of the "CRM Implementation" project.

## Project Scope

The scope of the project involves the configuration and implementation of the XYZ CRM system at the ABC Financial Services.

## References

Table

|  |  |
| --- | --- |
| Document Title | URL Link |
| "XYZ CRM System Overview" | Click here to access the document |
| " XYZ CRM System User Manual" | Click here to access the document |

# Product Description

## Product 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 |

## User Classes and Characteristics

Table

|  |  |  |
| --- | --- | --- |
| User Class | Characteristics | Favored? |
| Business Intelligence | Employees of the business intelligence department and users of the business intelligence module of the CRM system | Yes |
| Marketing | Employees of the marketing department and users of the campaign management and direct marketing modules of the CRM system | Yes |
| Actuaries | Employees of the actuary department ; can use any module of the CRM software | Yes |
| IT | Employees of the IT department responsible for the support and maintenance of the system |  |
| Data warehouse | Employees of the data warehouse department responsible for the support and maintenance of the data warehouse |  |

## Product Environment

* The XYZ CRM system shall be deployed on the existing ABC Financial Services network and servers
* The XYZ CRM system needs to be fully integrated with the existing data warehouse
* The users shall access to the system via web interface.

# Product Features and Requirements

## F 1.0 - Call center module

|  |  |  |  |
| --- | --- | --- | --- |
| Feature ID | Req ID | Requirement Description | Priority |
| F 1.0 | R 1.1 | "Single view of the customer" functionality | Must Have |
|  | R 1.2 | "Drill-down/drill through" functionality | Must Have |
|  | R 1.3 | "Search" functionality | Must Have |
|  | R 1.4 | "Internal redirection" functionality | Must Have |
|  | R 1.5 | "Statistics on customer behavior" | Must Have |
|  | R 1.6 | Customer web navigation help (online) | Should Have |
|  | R 1.7 | "Customer satisfaction survey" functionality | Should Have |
|  | R 1.8 | "Automated mailing" functionality | Should Have |

**NOTE:** Please note that requirements R1.1-R1.8 will have to be broken further into functional and/or non-functional requirements for this RS to be considered complete.

## F 2.0 - Business intelligence module

|  |  |  |  |
| --- | --- | --- | --- |
| Feature ID | Req ID | Requirement Description |  |
| F 2.0 | R 2.1 | "Customer profitability measurement" functionality | Must Have |
|  | R 2.2 | "Cross-sell/Upsell" functionality | Must Have |
|  | R 2.3 | "Sales channel profitability" functionality | Must Have |
|  | R 2.4 | "Customer analysis (demographics, behavior, etc.)" functionality | Must Have |
|  | R 2.5 | "Data mining" functionality | Should Have |

**NOTE:** Please note that requirements R2.1-R2.5 will have to be broken further into functional and/or non-functional requirements for this RS to be considered complete.

## F 3.0 - Campaign management module

|  |  |  |  |
| --- | --- | --- | --- |
| Feature ID | Req ID | Requirement Description |  |
| F 3.0 | R 3.1 | "Campaign management" functionality |  |
|  | R 3.2 | "Campaign executor" functionality |  |
|  | R 3.3 | "Campaign efficiency measurement" functionality |  |

**NOTE:** Please note that requirements R3.1-R3.3 will have to be broken further into functional and/or non-functional requirements for this RS to be considered complete.

## F 4.0 - Direct marketing module

|  |  |  |  |
| --- | --- | --- | --- |
| Feature ID | Req ID | Requirement Description |  |
| F 4.0 | R 4.1 | "Direct marketing" functionality |  |
|  | R 4.2 | Data definition |  |
|  | R 4.3 | Mail contents |  |
|  | R 4.4 | Reports |  |

**NOTE:** Please note that requirements R4.1, R4.2 and R4.4 will have to be broken further into functional and/or non-functional requirements for this RS to be considered complete.

## F 5.0 - Data warehouse integration

|  |  |  |  |
| --- | --- | --- | --- |
| Feature ID | Req ID | Requirement Description |  |
| F 5.0 | R 5.1 | "Data extraction" functionality |  |

**NOTE:** Please note that requirement R5.1will have to be broken further into functional and/or non-functional requirements for this RS to be considered complete.

## F 6.0 - Data cleanup

|  |  |  |  |
| --- | --- | --- | --- |
| Feature ID | Req ID | Requirement Description |  |
| F 6.0 | R 6.1 | Data quality analysis |  |
|  | R 6.2 | Data clean up |  |

## F 7.0 - Updates to the standard operating procedures

|  |  |  |  |
| --- | --- | --- | --- |
| Feature ID | Req ID | Requirement Description |  |
| F 7.0 | R 7.1 | SOP for actuaries |  |
|  | R 7.2 | SOP for sales |  |
|  | R 7.3 | SOP for marketing |  |
|  | R 7.4 | SOP for the call center |  |
|  | R 7.5 | SOP for IT |  |

## F 8.0 - Training

|  |  |  |  |
| --- | --- | --- | --- |
| Feature ID | Req ID | Requirement Description |  |
| F 8.0 | R 8.1 | Training for actuaries |  |
|  | R 8.2 | Training for sales |  |
|  | R 8.3 | Training for marketing |  |
|  | R 8.4 | Training for call center |  |
|  | R 8.5 | Training for IT |  |

# Appendix

N/A