



CRM System Upgrade: Business Requirements Document

This document outlines the essential requirements for upgrading our CRM system, ensuring enhanced efficiency and a stronger customer focus across all operations.

Executive Summary: Project Overview



Project Justification

Addressing current CRM limitations to drive sales growth, improve customer satisfaction, and streamline operational workflows.



Expected ROI

Anticipated 15% increase in sales efficiency and a 10% reduction in operational costs within 18 months, with full implementation in 12 months.



Key Stakeholders

Business users, IT team, executive sponsors, and sales/marketing leadership will actively participate.



Success Criteria

Achieving seamless data migration, improved user adoption rates, and measurable enhancements in customer engagement.

Business Context: Current Limitations & Impact

Current CRM System Limitations

- Outdated interface and poor user experience.
- Limited integration with existing marketing and sales tools.
- Inadequate reporting and analytics capabilities.
- Lack of mobile accessibility for field teams.



These challenges result in data silos, inefficient workflows, and a fragmented view of customer interactions, hindering our strategic growth objectives.

Functional Requirements: Customer & Sales

FR-001: Customer Data Management (Must Have)

The system shall enable comprehensive customer profile management, including contact details, interaction history, and segment categorization.

FR-002: Sales Pipeline Tracking (Must Have)

The system shall provide robust tools for tracking sales opportunities through all stages, from lead generation to closure.

FR-003: Reporting & Analytics (Should Have)

The system shall generate customizable reports on sales performance, customer trends, and marketing campaign effectiveness.

Functional Requirements: Automation & Access

FR-004: Marketing Automation Integration (Must Have)

The system shall seamlessly integrate with our existing marketing automation platform for lead nurturing and campaign management.

FR-005: Mobile Access (Must Have)

The system shall offer a fully functional mobile application for sales and service teams to access and update data on the go.

FR-006: Workflow Automation (Should Have)

The system shall support configurable workflow automation for routine tasks, such as lead assignment and follow-up reminders.

Non-Functional Requirements: Performance & Security



Performance

System response time shall be under 2 seconds for 95% of user interactions, supporting 500 concurrent users.



Security

All sensitive data shall be encrypted in transit and at rest. Access controls must adhere to role-based permissions.



Reliability & Availability

The system shall maintain 99.9% uptime, excluding scheduled maintenance, with robust data backup and recovery protocols.



Implementation Considerations

- **Technical Constraints:** Compatibility with existing IT infrastructure and adherence to cloud-first strategy.
- **Integration Requirements:** Seamless integration with ERP, marketing automation, and customer service platforms.
- **Training & Change Management:** Comprehensive training programs for all user groups and a structured change management plan to ensure smooth adoption.

Key Takeaways & Next Steps

1

CRM Upgrade: A Strategic Imperative

This upgrade is crucial for enhancing customer relationships and operational efficiency.

2

Collaborative Development

Your input is vital as we move forward in defining and implementing these requirements.

3

Next Steps: Review & Refine

Please review this document and provide feedback to finalize the requirements for the CRM system upgrade.