CIS 498: Week 4 Project Deliverable 2

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# Project Overview

Juric intends to implement a Customer Relationship Management (CRM) system to integrate its systems so that it can provide efficient services to customers. The purpose of the project is to improve the relationship between Juric and its customers. Juric is a Startup Company selling beauty products online and therefore, it must have a good platform where it can engage, process, and deliver products to customers. The CRM would help Juric to get information it needs and also deliver services to customers. CRM integrate most organization departments such as sales, marketing, finance, customer services, logistic and also human resource (Brocato & Potocki, 2015). It therefore, allows the departments to share information hence improve the service delivery. The implementation of the CRM will allow Juric to receive orders, process, deliver, and also monitor the performance of every employee and the departments. Juric would be able to assess the weakness and strength faster and take immediate action as well. This is a key platform, which can change the performance of the company. Its successful implementation is likely to change the way Juric interact with customers, conduct marketing and sales, and also introduce new aspect of marketing and engagement, since it will be integrated with social media.

# Background

Juric still operates using offsite computers where information is store in the computer drive and most data are prepared in excel. Each computer has several data related to each department and stored in the hard drive. In the last six months, the company has experienced lost of data due to power related problems and virus, which have made the information stored in the computers very vulnerable. With each departments having several data and data are stored inside the hard drive, the entire operation of the company is at risk. Most of its financial, sales and personal details data are kept in excel and stored in the hard drive. The information is not secure and can be accessed by employee without access policies.

It is also been established that Juric has a problem how it relates with its customers. It lost contacts of almost 50% of its customers and therefore, it cannot efficiently deliver services. Again, there is a problem of monitoring of orders and processing as well because of lack of connection between customers and the company. It has made service provision to be difficult hence reducing the profit margin of the company With CRM system, the company would be able to improve its relationship with the customers and also provide or deliver services on time. Therefore, it needs a software or application, which can transform the data storage and improve its relationship with customers as well. Customer Relationship Management integrated with Management system would be the best system to change the operation and management of information. It ensures that employees can act swiftly to needs of customers and also collect the views. This is a key component which is likely to address the problem of related to customer and organization relationship.

The project therefore, intends to deliver an integrated CRM with management system. The CRM and management system are key in efficient organizational functions (Chittaie, 2012). As stated by Chittaie (2012) CRM is inclusive and it brings the operations of all departments under one platform. This help manager to analyze sales and financial transaction at one point hence enhance quick decision making process. It also decentralized information under one platform and therefore, brings efficiency (Buttle, 2016). Besides functional CRM and Management system, the project intends to trained employees, and transfers all documents whether finances, sales, marketing, and personnel to the digital platform. By the end of the project, all the information or files shall be transferred into the system. The system would be tested and left as functional to improve the operations of the company.

# Customer Relationship Management System

CRM and Management system are one ICT system integrated to function as one. The CRM address the problems between an organization and clients. It brings all the functions of key departments together such as sales, finance, marketing, customer service and logistic less than one platform. Implementation of CRM by Juric would allow it to operate efficiently. The CRM is an elaborate system, which linked various sectors of an organization. It connects data related to customer respond to products and how product is perceived in the market (Fabac & Mance, 2011). CRM has several features and it is upgrade often to cope up with the changing business environment. Juric’s CRM shall have several interfaces for easy use by employees. It interfaces shall be design to make it easy for every employee to use without facing difficulty. CRM features are customer response, customer satisfaction, customer needs, customer reaction, and customer service. Each of these features will be integrate with the system to ensure that the company is able to deliver efficient services to customers. CRM intends to address the relationship between customers and the company. It shall improve the relationship between Juric and its customers by ensuring that the company is aware of customer’s perception, needs, and likes regarding its products. With this kind of information, Juric would be able to deliver services and also address the communication break between customers and the company.

Management system therefore, shall have financial management, human resources and other back office services. The CRM shall also have logistic section where delivery can be tracked to ensure that services are delivered efficiently as required by customers. The management is a key to success of CRM because the two systems are integrated to effectively address the problem Juric faces (Brocato & Potocki, 2015). The management system defines an organization operation. It also transform all hard copies to digital and therefore, the information stored in the desktop in excel format would be transfer to the system and kept on the cloud. Management system would bring the efficiency in financial management and operation of the company (Catalán-Matamoros, 2015). The essential objective to convert the analogue to digital, improve the performance and relationship between customers and the organization would be met through the implementation of CRM system.

# Project Goal and Objectives

The goal of the project is to improve the relationship between the company and its clients and potential clients. It intends to establish a platform where the company can engage its customers efficiently in order to deliver to them services. The main objective of the project is to help the company to improve its performance through efficient service delivery. It also intends to the service delivery of the company hence profitability.

The IT role for this project is meant integrate various sectors or departments. The Sales, finance, marketing, and customer service department would be integrated on one platform. The sales, customers, marketing would be able to work together in delivery of services through a shared platform. Therefore, a shared platform would be delivered to allow departments to share information regarding customers. The department integration will be done so that management of clients could be easy and efficient. The focus of the project is to deliver s manageable and efficient system for the company. The system shall comprise of system admin, where the administration rights and policies are integrated to enhance security of the system and to ensure that system users are clearly defined. After the system management has been obtained, the software, database, design, implementation and cloud computing where the system will be hosted. It is also important to illustrate that the system will be hosted by the third party company and Amazon has been identified as the best company to host the system because of the security and the management offer it provides companies.

1. ProjectScope

The project will captured various areas to deliver quality service to customers. It defines application, sites, process reengineering, customization, and interface, conversation, testing, funding and training.

|  |  |
| --- | --- |
| **Applications** | In order to meet the target production date, only these applications will be implemented:   1. Management system 2. Customer Relationship Management Application 3. Virus 4. Cloud computing system 5. Logistic analysis |
| **Sites** | These sites are considered part of the implementation:   * Juric’s website and management system * Amazon cloud computing provider |
| **Process Re-engineering** | Re-engineering will:  In order to ensure that the data is flowing, and there is efficient communication among various departments, the system interface would be done. The interface shall include data flow and connectivity, reporting and analytical system. |
| **Customization** | Customizations will be limited to:  The customization will be done on the interface, reporting and data collection to ensure that the system reflects the objectives of the project. Since, the project is meant to address the problem of relationship between the user and the  Interfaces  Reporting  Data Collection & Analysis/Customer Specific |
| **Interfaces** | Interfaces included are:  Customer- Allows customers to give order interact with the company or sales team and provide feedback as well.  Employee: Allows employees to work efficiently. It ensures that employees can be able to access data from the platform without any difficulty.  Query/Search: This is the search section which employees and even customers can use to search for services and any other products being offered by the company.  Reporting: the system also has a platform or feature where employees can use to generate reports. |
| **Architecture** | Application and Technical Architecture will:  The network structure, servers, and installation of computers will be done and completed as required.  The server security will also be implemented at the entry level of servers, and network system. The network security will be implemented at the CISCO router by introducing several entry points to prevent any unauthorized entry to the system. Security is a key component of the system, and therefore, firewall hardware shall also be installed at with Cisco router. This will improve the security of the system hence addressing all the concerns regarding the security of the system. |
| **Conversion** | The following data will be converted to digital and then posted in system:   1. Sales data – including customers, potential customers and their areas of jurisdiction. 2. Marketing records which include signed agreements 3. Data from the warehouses and agreement regarding the stores 4. Employees’ details and therefore, departments. 5. Any other legal agreement of the relevant department to CRM will be added to the system. |
| **Testing** | After the project shall have been installed and data converted into the system will be testing. The testing of the system shall be based on:   1. Interface : 85% success to mean that it can be used without any problem 2. Connections: connection should be 100% so that all users can be able to get connection between the server and the desktop. 3. 3. User 4. Systems Testing 5. Unit Testing 6. Integration Testing 7. Data Conversion 8. Analytics/Reporting |
| **Funding** | Project funding is limited to:  The budget defined for the project, which shall cover the purchase, designing and training of the staffs.  Estimating: $ 40,000  Sources: Juric Savings and contribution from shareholders |
| **Training** | The training of staffs will be done by the vendor. The training to be conducted based on seniority. First, the senior managers will be taught on how the system works. All staffs will be trained as well and the training should focus on end user needs and interface interchange to ensure that all staffs are acquitted with the CRM operations. The technical staffs will be trained on admin rights and accessibility. The training will be conducted in the training of the company where staffs will be trained every evening for a period of 15 days.  The training therefore, will cover user interface, administration, and Mobil App, which are available for the company to use. The tech team will also be trained cloud technology and integration troubleshooting. |
| **Education** | Education will include:  The staff will also be required to have knowledge in computer packages to be able to use the system. However, the technical team is required to have degree in Information Communication technology, computer science and any other related field. |

# Constraints and Assumptions

# Budget

In order to complete the project efficiently, a total of $40,000 will be required. The finances will be used to purchase hardware and software required for the implementation of the project. The finances will also be used for training, transfer of information to the system, testing and wages for project team. Juric intends to utilize its staffs as part of the implementation team so that it can cut the budget on salaries and wages. The budget will be split among the operation expenditure, purchasing of assets and development of software. The CRM’s application to cost $15,000, setting up of infrastructure and purchasing of hardware to cost $10,000, training of staffs $5,000 and data entry or transfer of data to the system, $5,000. License of software and application to cost $5,000 and therefore, in total the cost of implementation of the project is $40,000.

## Legal Requirement

For complete implementation, license will be required for all the software. The CRM application will be installed in server and the service will be running on Window Server 8 or Window Server 10. Each application will require license for installation and therefore, the company intends to comply with the entire legal requirement for the implementation of the project. The company will also have to get license for CRM and any other system or software which shall be used in the process of implementation of the project.

## Project Schedule

The implementation of the project shall be done six months from the day the project is approved. The project time shall include the purchase, data preparation, development, testing and training of staffs.

**Table 1: Project Time Frame**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **No/S** | **Task Name** | **Start** | **Finish** | **Duration** |
| 1 | Requirement definition | June 1, 2019 | June 15, 2019 | 15 days |
| 2 | Vendor Selection | June 16 | July 15 | 30 days |
| 3 | System design | July 16, | September 16, 2019 | 60 days |
| 4 | System Installation | September 20 | October 5 | 15 days |
| 5 | Data Preparation | September 20 | October 20 | 30 days |
| 6 | Network set up | July 20, 2019 | August 20, 2019 | 30 days |
| 7 | Interface setup | October 22 | October 30 | 8 days |
| 8 | Testing | Nov 2, 2019 | November 4, | 2 days |
| 8 | Training | Nov 5, 2019 | December 5 | 30 days |
| 9 | Handing over | December 10, 2019 | December 11 | 2 days |

# Personnel

For the project to implemented, qualify staffs would be required. The staff from sales, marketing, and customer representative and project manager would be incorporated into the project team. These departments are important for the efficient implementation of CRM since they work directly with customers. The project shall be monitored and supervised by the Project Manager to ensure that it is completed within the time agreed and the objectives and goals of the project are met at the end of the project. The project team will comprise of QA test Engineer, marketing team, project manager, representative from key sectors of the company, Application analysis and the application developer. Each member of the project team shall have defined responsibilities to ensure that the project is completed as required and the objectives and goals are achieved.

# Funding Available

Juric has $30,000 for the project. Therefore, it shall seek for the remaining 10,000 from stakeholders so that it can be able to complete the project. The deficit will be obtained from shareholders or a long term loan from the bank or any financial institution.

# Building ready

The project will be implemented in the head office of the company, where most infrastructures are already available. The project will be implemented in stages. At every stage the project will be monitored to ensure that it goes.

# Monitoring and Evaluation

The project shall be monitor in every stage to ensure that it completed based on the objectives and goals set. The evaluation to be done based on the success of every stage. The success and effectiveness of the project will also be monitored based on the performance of the company. Therefore, six months after the completion of the project, the organization intends to carry survey among its customers and potential customers to determine if the project has created any impact and positively benefiting the company.

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