

I'm not a bot



Crn business requirements document example

Our approach goes further than a typical RFP by focusing on specific needs rather than just listing features. Before creating your requirements document, we suggest organizing and prioritizing business needs through a structured CRM selection process. This ensures that your chosen CRM solution is well-suited to meet your foundational goals and realistic expectations. We are Abbott Ltd., a company established in 2005 that specializes in selling kiosks directly to businesses and government entities in the US and Canada. We also have distributors in Europe and Asia. Our clients include retail chains, independent retailers, and hotel groups. Kiosks can be found in various settings such as retail stores, hotel lobbies, airports, and more. We currently serve over 300 customers with an average of 25 locations per customer, and some locations even have multiple kiosks. This puts our addressable market at over 10,000 companies. Our sales team consists of ten outside account executives (AEs), each covering a different region in the US or Canada. Three inside sales development representatives (SDRs) support these AEs by providing leads to work on independently. SDRs are not paired with specific AEs but can collaborate with any AE as needed. The AEs report directly to one of two regional sales managers (RSMs), who oversee the eastern and western regions, respectively, along with Canada. These RSMs then report to our VP of Sales. In addition to these roles, we have two sales engineers (SEs) aligned with the east and west regions, respectively. They often accompany AEs on sales calls when necessary. Our major account representative focuses on a dozen significant accounts, reporting directly to our VP of Sales. Currently, salespeople use contact managers, spreadsheets, and email address books to manage contacts, but our current contact manager has low adoption among field users. Our sales team uses a variety of devices including PC notebooks, Macbooks, iPhones, Android devices, and even tablets for some AEs. These individuals are responsible for managing existing accounts, developing new business independently, and following up on leads handed off by SDRs. Proposals created by our AEs are detailed documents with embedded pricing spreadsheets and are often 8-12 pages long due to the complexity of our quoting process, which involves customizing kiosk solutions for specific customer requirements. We also have a marketing team that includes a contract blogger who writes informative posts about kiosks. Our CEO is a thought leader in the industry and occasionally shares insights through blog posts, aiming to drive visitors to landing pages where they can download additional content in exchange for contact information such as name, company name, and email address. Given article text here we currently use three SDRs and manage leads using an in-house contact manager. When new leads arrive we send them emails with different templates that help drive engagement on our kiosk info on social media platforms like Twitter, Facebook & LinkedIn. We run webinars via Zoom which are managed separately from our main CRM system. Customer info such as trade show leads is manually added to our CRM. SDRs select from the new leads and contact them for follow ups. When they qualify a lead we send an AE with updates on that customer. We also send out monthly newsletters to selected contacts at customer accounts via email only. Our experience with under-utilized systems has taught us that the following are crucial success factors for our current CRM initiative: 1. Involving end-users in the design process 2. Adopting third-party recommended best practices 3. Focusing on high-value functionality 4. Providing a comprehensive view of customer information from a single interface 5. Ensuring easy access to essential information across multiple platforms 6. Internal ownership and support of the application after initial rollout 7. Implementing an ongoing training strategy We aim to leverage our website's four landing pages, including to capture leads directly into a CRM system. New leads will be distributed to SDRs in a round-robin manner. To support business model requirements, SDRs must view and maintain lead information such as source, landing page name, status, reason for disqualification, and number of locations using kiosks. They should also update personal profiles and company records if the lead already exists. When qualifying leads, SDRs will convert them to accounts/contacts and assign accounts to AEs. AEs receive email notifications upon account handoff. SDRs shouldn't create sales opportunities; instead, AEs will initiate them after discussing with key contacts at customer/prospect accounts. To track business model requirements, we need to record office locations and kiosk installations in a parent-child relationship. Key company-level information includes: * Customer Accounting ID * Type (Prospect, Customer, Vendor, Competitor) * Sub-Type (Business Office, Kiosk Location) * Status (Active/Inactive) * Number of locations AEs should see recent sales order header information for the last two years when viewing accounts. Key sales order details include salesperson territory, order number, P.O. number, date, ship date, and total dollar amount. Customer account records will display financial information such as MTD Sales, YTD Sales, Previous YTD Sales, Credit Limit Amount, and Past Due. Our IT team can schedule daily CSV exports of new sales orders and customer financial data from our ERP system to an FTP site. To implement a robust tracking and management system for kiosks installed at each location, our IT department can provide an export file containing essential data points such as serial number, model, operating system, software version, date installed, warranty expiration date, and more. Initially, we will manually enter or import new locations and kiosks into the CRM system. Our AEs, SEs, and major account representatives should have visibility to any open support issues when viewing a customer record. We want to track various key pieces of information about contacts, including role, email address, holiday card status, and personal LinkedIn profile URL. When viewing a contact record, users should be able to see the account's status and type without navigating to the account record. To facilitate sales efforts, AEs should create opportunities in CRM for potential add-on sales to existing accounts and new sales to new accounts. We need to track details such as opportunity type, SDR credits, expected close date, revenue stage, commit status, competitors, and reasons lost. The existing web forms on our landing pages should be replaced with new web forms that automatically create new lead records in the CRM system upon visitor submission. We aim to send our monthly customer newsletter directly from the CRM system, allowing users to view opens, clicks, and unsubscribes. For marketing automation, we are interested in a webinar platform that integrates with CRM, enabling features such as automatic lead tracking, live webinar viewing, recorded webinar viewing, and engagement metrics. We also want to manage support cases within the CRM system, where emails sent to support@abbott-ldt.demo should automatically create new cases. We will evaluate marketing automation systems later this year, with HubSpot and ActiveCampaign as top contenders. Finally, we want to replace the form on with a form that creates a new case in the CRM system, ensuring timely resolution of high-priority cases and notifying customer service managers when necessary. We want to track the following details within our case management system: Type of issue, Hardware or Software Priority level Location Customer contact information Serial number The main goal is to provide management with visibility into key performance indicators. We aim to ensure that new leads are consistently generated and worked on in a timely manner, lead conversion rates continue to improve over time, and customer service issues are addressed promptly. Our initial set of reports includes metrics such as lead generation, lead status, and conversion rates. We also plan to monitor user adoption and address any under-adoption issues. We currently use Microsoft 365, but our users only access Outlook 365 on their desktops sporadically. To improve productivity, we need to allow users to attach emails from any email client to CRM records. Additionally, the ability to synchronize the CRM calendar with Outlook would be beneficial. For smartphones, compatibility is crucial, along with features like searching for contacts, logging meeting notes, and attaching SMS exchanges. We plan to migrate critical information from our contact management system while keeping it accessible in case users need to refer back to previous data. We are planning to integrate our ERP system with a new CRM system. Our current setup involves separate Ship To addresses for each customer location, which we plan to extract into the CRM system and link to parent records. Key permissions include read-only access for users, except administrators, and specific field-level controls for sales teams. For the implementation partner selection process, we require training for our contact manager administrator, another CRM admin, and at least one in-house developer. We aim to add AI-powered case routing capabilities, with data integration from our kiosks to support cases. A knowledge base will be integrated into the CRM system, along with an AI chatbot to deflect specific requests.

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