



Cordlife CRM Implementation Project Proposal

Prepared By: Umesh Chandra Gaddala

2. Situation, Problems & Opportunities

Situation

Cordlife uses manual tools like spreadsheets and emails.

Limited visibility and delayed responses across teams.

No centralized platform for managing leads and follow-ups.





Problems (with Success Goals)

1

Manual data handling

95% centralized data storage.

2

Delayed follow-ups

40% reduction in response time.

3

Inefficient lead tracking

90% visibility across pipeline.

4

Data duplication

95% consistency and accuracy.

5

No real-time insights

100% dashboard visibility.

6

Unstructured workflow

100% standardized process.



Opportunities

Implement a centralized CRM for automation and tracking.

Standardize lead management and automate follow-ups.

Provide real-time analytics for sales and management teams.

Ensure a Waterfall-based rollout with testing and validation.



3. Purpose, Objectives & Success Criteria

Purpose

Implement a CRM solution tailored for Cordlife' s operations.

Streamline lead tracking, automate communication, and reduce manual work.

Apply Waterfall methodology for structured execution.

Objectives

Select a CRM aligned with business requirements.

Prototype and test with real sales data.

Integrate with marketing and support platforms.

Conduct user training for smooth adoption.





Success Criteria

1

90% leads tracked through CRM in 3 months.

2

30% increase in sales productivity.

3

40% reduction in follow-up response time.

4

95% data accuracy and 100% visibility through dashboards.

4. Waterfall Methodology Overview

Project follows the Waterfall SDLC — structured, sequential, and measurable.

Phase	Goal	Key Deliverables / Tools
1. Requirement Gathering	Identify needs & gaps	BRD, SRS – Excel, Lucidchart
2. Design	Define workflows, UI, and data models	DFDs, UI Mockups – Figma, UML
3. Development	Customize CRM & integrate tools	Zoho/Salesforce, MySQL, API Gateway
4. Testing	Validate functionality	Test Cases, UAT Logs – Jira, TestRail
5. Deployment	Rollout and train users	AWS/Zoho Cloud
6. Maintenance	Support, optimize, and report	Dashboards, KPIs, Reports

5. SDLC Details (BA Involvement)

1 Requirement Gathering

Interview stakeholders, prepare BRD/SRS.

3 Development

Support developers and manage RTM.

5 Deployment

Validate migration and go-live activities.

2 Design

Define processes, collaborate on UI & data flow.

4 Testing

Create & review test cases, manage UAT.

6 Maintenance

Measure KPIs and document enhancements.

Tools Used: Jira, Excel, Confluence, Figma, Lucidchart.

6. Project Team Structure

Role	Responsibility
Project Manager	Oversee project scope and timeline.
Business Analyst	Requirements, documentation, testing, and UAT.
CRM Developer	Customize CRM modules and workflows.
Database Administrator	Manage data migration and backups.
UI/UX Designer	Design user-friendly dashboards and layouts.
QA Tester	Conduct testing and validate requirements.
System Admin / IT Support	Handle deployment and maintenance.
Vendor Consultant	CRM customization and platform integration.
Trainer / End User	Participate in training and feedback.

7. Timeline & Tools

Timeline (6 Months)

Phase	Duration
Requirement Gathering	1 Month
Design	1 Month
Development	2 Months
Testing	1 Month
Deployment & Maintenance	1 Month

Budget: ₹8,00,000

(Covers CRM license, setup, vendor services, and training)



Tools & Technologies

CRM

Zoho CRM / Salesforce

Database

MySQL / PostgreSQL

Design

Figma, Lucidchart

Documentation

Word, Excel, Jira,
Confluence

Testing

TestRail, Jira

Hosting

AWS / Zoho Cloud

Communication

Slack, Teams, Outlook

8. Risks & Dependencies

1

Data migration issues may affect accuracy.

2

Vendor delays could extend project timelines.

3

Low user adoption due to limited training.

Mitigation:

1

Early user engagement.

2

Phased rollout with pilot testing.

3

Continuous training and vendor monitoring.



9. Expected Benefits

30% improvement
in sales team
efficiency.

40% faster follow-
up and
communication
cycles.

95% accurate and
unified client data.

Real-time dashboards for data-
driven decision-making.

Improved customer
engagement and satisfaction.





10. Key Takeaways

1

Waterfall SDLC ensures structured and predictable delivery.

2

CRM replaces manual processes with automation and analytics.

3

Strong BA involvement ensures business alignment and quality.

4

Outcome: Improved productivity, lead management, and reporting accuracy.

The background of the slide features several translucent blue water droplets and bubbles of varying sizes. Some droplets are in sharp focus, showing internal reflections and highlights, while others are blurred in the background, creating a sense of depth. The overall color palette is light blue and white, giving it a clean, fresh, and aquatic feel.

Thank You