

## Project Initiation Document (PID).

Project Name: DIT CRM Platform  
Project ID/ No: DIT-CRM/980465  
Project Manager: Ese Elakama  
Date: 05/09/2022  
Version: v1.0

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## **1. Project background / Introduction**

Digital Infotech Agency was established in 2019 just after the covid-19 pandemic. The business saw an opportunity where 56% of most businesses moved online to have an online presence.

The business created its own digital platform (website) and proceeded in getting other external clients on board to develop their own business websites.

A part of what was omitted in Digital Infotech Agency's website was a Customer Relationship Management system (CRM) which their customers could use to get in touch with the business and how they could use to CRM system to manage their customer's data.

Now, Digital Infotech Agency is looking to integrate a new CRM system Salesforce into its digital platform. This change is to be reflected on the website on both laptop and mobile devices.

## **2. Project Benefits**

By integrating Salesforce CRM into the digital platform, the system will enable the business to:

- capture all its customers data accurately
- have a centralized database for all customers data
- manage all customers data

## **3. Project Scope**

The project aims to update the digital platforms (website and Mobile App) of the business by:

- Create a new contact page
- Integration Salesforce CRM to the contact page

## **4. Constraints and Assumptions**

### **a. Project Constraints**

The following are the constraints to delivering the Online Payment Integration portal project:

- A short delivery date of 3 weeks to integrate Salesforce CRM,

- A limited time to deliver an updated digital platform for the website and mobile App.

#### **b. Project Assumptions**

The following are the assumptions for updating Digital Infotech website:

- Updating the digital platform will not disrupt Business As Usual (BAU).
- Update to the digital platform will have no impact to users on the website.

### **5. Project Plan**

Detailed schedule and project plan will be available in the Project Plan document.

### **6. Project Methodology**

The project methodology to be used in delivering an updated contact page on Digital Infotech's website will be Waterfall & Agile Methodologies, respectively.

### **7. Critical Success Factors**

The CSF for delivering an updated contact page on Digital Infotech's website are:

- To ensure a new contact page is developed.
- To ensure the CRM system is integrated into the contact page before the 1<sup>st</sup> of October 2022
- All changes are to be visible on all devices (Laptop, Desktop & Mobile).

### **8. Risks – analysis, prevention, management, and monitoring**

See RAID LOG document

### **9. Reporting**

The Business Analyst (BA) will escalate any unresolved issue(s) to the Project Manager (PM).

### **10. Project sponsor**

Mark Hales is the Project Sponsor.

## 11. Stakeholder List

Name	Role	Approval/ Review/ Information
Mark Hales	Project sponsor	Review/ Approval
Gary Wayte	Head Sales	Review/ Approval
Angela Edwards	Head Marketing	Review/ Approval
Simon Young	Head of IT Commercials	Review

## 12. Glossary of terms

Term	Definition
CRM	Customer Relationship Management
PM	Project Manager
PML	Platinum M3dia London Ltd

## 13. Version Control

Version	Reason for change	Date
V 0.1	Creation of PID by Ese Elakama	26/08/2022
V 0.2	Review of PID by Project Sponsor	2/09/2022
V 1.0	Approval received from project sponsor	5/09/2022