

Project Brief: [Project Name]

[Draft - For internal use only]

COMPLETING

Prepared For:

Name:

[Enter Key Stakeholder, name & title]

Date:

Summary:

Project Type:

[Enter]: i.e. Software implementation]

Business Objectives:

[Primary goal and sub-goals for this project]

[Example]:

1. Shorten sales cycles, improve sales conversion rates
 - a. Clear pipeline visibility (All associates)
 - b. Clear segmentation + targeted communication
 - c. Improved automation to reduce admin work for sales

Deliverable/s:

[Primary & Secondary Deliverables/Working Solution]

[Example]

1. Working MVP of Pipedrive CRM
 - a. V1 Fields & Forms defined/implemented

Primary Components:

1. CRM Application
2. Pipeline Stages, Data Mapping & Configuration
3. Integrations (Calendars & Email)
4. Content (Follow-up communication, collateral)
5. Automations
6. Reporting

**Est.
Timelines/Roadmap:**

1. Discovery - Understanding the current state & goal states
2. Clearly define MVP requirements factoring relevant voices
3. Compare and select CRM app - 30-days+/-
4. Account onboarding and configuration (Data, fields, forms etc.)
5. Data clean-up and import
6. Integrations and automations set-up
7. Content development and implementation
8. V1. Pilot release, training, feedback
9. Broader roll-out and change-management plan

**Project
Participants/Roles:**

1. Owner: [Key stakeholder name]
2. Dev/Implementation: [Participant names and functions]

	3. Consulted: 4. Informed: See RACI index overview here
3rd Party Contractors:	List outside vendors, roles, and
Current Apps:	1. Google Workspace 2. Slack 3. Jira 4. Zoom 5. Calendly 6. Hubspot 7. Shopify 8. Sendgrid
Gaps & Risks:	1. Vendor A is consistently late on their commitments as evidenced by xyz, this poses a risk to the goal timelines. a. Remedy: Request a single point of contact on the vendor side who is wholly responsible for delivering on their promises. b. Request they participate on weekly planning and review calls c. Request they operate inside our internal Project Management System (Asana, Monday, Clickup etc.) 2. Capacity may be constrained by only one developer on the project. 3. Leadership is difficult to reach and has challenges making key decisions to keep projects on track. a. Request they attend the weekly review call to keep decision velocity high w/ access to their direct phone number, email, text, etc for quick feedback/decisions when needed.
Contact Directory:	[Link to Project Contract List i.e. Google or Excel Sheet]

Questions, reach out to your Completing Project Lead directly? Or, email us at: done@completing.com, Or visit: completing.com.

Functional Requirements & Considerations	
Creative Requirements & Considerations	
Add'l Requirements:	
Notes & Background Info	