1. Project Overview

Provide a high-level description of the project.

Describe the main idea behind the project in simple terms. What problem does the software solve?

Example:
The objective of this project is to create a bespoke Customer Relationship Management (CRM) system tailored for a mid-sized insurance company. This system will centralize client data, manage policy renewals, claims, and interactions, and provide analytics to track client engagement and sales performance.

2. Goals and Objectives

Define clear, measurable goals for the software.

List what the software should achieve. Use specific outcomes to measure success.

Example:

- "To reduce the time spent by sales agents on data entry by 50%."
- "To increase customer retention by providing timely and personalized communication, aiming for a 30% improvement by the end of year one."
- "To enhance the reporting capabilities to provide real-time insights into sales trends and customer satisfaction."

3. Target Audience

Identify who will use the software.

Describe the end users of the application. Understanding the users helps tailor the design and functionality.

Example:
The software will be used by 100 sales agents who are often on-the-go, 10 sales managers who need to monitor team performance, and 5 top executives who will use the software to make strategic decisions. The interface should be optimized for desktop use in the office and mobile use during client visits.

4. Features and Requirements

Outline specific features and functionalities the software must have.

Be as detailed as possible about what the software needs to do. Differentiate between 'must-have' and 'nice-to-have' features.

Example:

- "Must-have: A dashboard for sales agents to view their daily tasks, client communication history, upcoming policy renewals, and performance metrics."
- "Must-have: Automated workflows for claims processing and policy renewals to minimize manual tasks."
- "Nice-to-have: Integration with social media platforms to enable sales agents to receive alerts about client milestones and events."

5. Budget and Resources

Establish financial limits and resources available.

Include an estimated budget for the project and mention any existing resources (like software tools or personnel) that can be utilized.

Example:
Our budget is not to exceed $50,000. We already have enterprise licenses for Microsoft SQL Server that can be used.

6. Constraints and Risks

Identify any potential obstacles or risks.

Mention any limitations (such as technological, budgetary, or timeline constraints) and risks that could impact the project.

Example:
One major constraint is the integration with the existing legacy system which is built on outdated technology. This may require additional custom solutions. There's also a risk of project delays due to the dependency on third-party vendors for certain data integrations.

7. Evaluation and Success Metrics

Define how the success of the project will be evaluated.

State how you will measure the effectiveness of the software once deployed.

Example:
The system's success will be evaluated based on user adoption rates, with a target of 90% usage among the sales team within three months of launch. Additionally, we will measure the average time saved on administrative tasks and the increase in client interactions per sales agent.

8. Approval and Stakeholders

List key stakeholders and their roles in the project.

Identify everyone involved in the project decision-making process and their responsibilities.

Example:
Project approved by: Sarah Connor, CEO. Project Manager: Kyle Reese, Director of Technology. Key Stakeholders include the IT department, sales team leaders, and customer service managers.

9. Contact Information

Provide contact details for further communication.

Ensure there are clear points of contact for any questions or updates related to the project.

Example:
For project inquiries or updates, please contact Kyle Reese, Director of Technology, at kyle.reese@insuranceco.com or call (555) 123-4567."