### **Executive Summary**

The goals of the sales and marketing department are to aggressively promote Dirt Bike USA to generate sales for the company and to promote stronger relationships with their customers, including making it easier for them to share their bike experiences.

### **Scope Statement**

The purpose of this project is to find how to best position Dirt Bike USA to reach their goals with a Customer Relationship Management (CRM) system that will allow the company to learn their customers preferences and buying behavior to send targeted messages and promotions. Additionally, the company needs to be able to generate reports and analytics to support decision-making (Laudon & Laudon, 2020).

#### Business Objectives

* Implement a more robust database system that is scalable and maintains speed as the company grows.
* Analyze workflow processes for ways to increase efficiency, save time and money, and generate sales.
* Analyze customer preferences and buying behavior to lead sales and marketing initiatives.
* Incorporate social media to promote stronger relationships with customers so they can easily share their bike experiences.

### **Project Details**

#### Requirements

* Comprehensive data on customers, dealers, inventory, marketing, and sales.
* Comprehensive dealer data covering sales figures and performance metrics.
* Customer information such as contact details, purchase history, and preferences.
* Sales information such as buyer, quantity, date of order, unit price, total price, product.
* Dealer information such as name, contact information.
* Inventory information such as products, quantity, and unit price.
* Marketing information such as how, where, and when marketing campaigns are run and the spend.

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#### Recommendations

My recommendation is to use a CRM for the sales and marketing department. Since Dirt Bike USA has multiple departments that are related in some fashion, we could use a central database with separate client systems for each department. This would allow the executives to see the overall performance of the company and to drill down into more details (Laudon & Laudon, 2020). Additionally, it will give the managers the information they need to make informed decisions.

Microsoft Access would be insufficient considering the anticipation of a growing customer base and increased sales, and the inability to scale or integrate business analytics and other apps into it. A separate system can be used for each department since they each have their own data needs. Another benefit to a CRM is that it is designed to handle large volumes of data efficiently, ensuring quick access and smooth performance even as the business grows (Laudon & Laudon, 2020).

#### Rationale

CRM is scalable as opposed to Microsoft Access. Microsoft Access has max storage of 2 GB and experiences significant speed reduction in processing time when 10 or more simultaneous users are using the system (Singh, 2024). Additionally, CRMs can be cloud based so there would be no need for housing physical servers and maintaining them (Salesforce, n.d.).

Currently, management uses reports like income statements, summary balance statements, and annual sales both domestic and international. With a new finance system, the company could integrate better quality reports through a CRM because you would be able to query the database for custom reports and for real-time dashboards.

**References**

Laudon, K.C. & Laudon, J.P. (2021). *Management information systems managing the digital firm*.

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Singh, T. (2023, July 1). *Advantages & disadvantages of MS Access*.

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