

# **Project Implementation of**



**Submitted To  
Professor Dr. Mohammed Masum Iqbal  
Pro Vice Chancellor,  
Daffodil International University.**

**Submitted by  
Tahmid Malek  
221- 45 -025  
Department of Innovation & Entrepreneurship  
Daffodil International University**

**Date of submission: 10 November, 2025**

## Declaration

We hereby declare that this project has been done by us under the supervision of Professor Dr. Mohammed Masum Iqbal, Pro Vice Chancellor, Daffodil International University. We also declare that neither this project nor any part of this project has been submitted elsewhere for award of any degree or diploma.

Supervised by



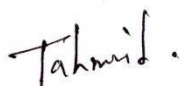
Professor Dr. Mohammed Masum Iqbal

Pro Vice Chancellor,

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Submitted

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## **Letter of Transmittal**

November 10, 2025

Professor Dr. Mohammed Masum Iqbal  
Pro Vice Chancellor,  
Daffodil International University.

Subject: Submission of the report “Implementation of Eduvisory CRM”.

Dear Sir,

I am pleased to submit the report “Implementation of Eduvisory CRM” as part of Project 12 of the Department of Innovation & Entrepreneurship for your consideration. We sincerely tried to Business Report and examined relevant records to prepare the report.

I have worked to make this report as comprehensive as possible within a limited time.

However, due to various restrictions, it may be incomplete. For this reason, I beg your kind consideration.

Sincerely yours,

Tahmid Malek

(221-45-025)

Department of Innovation & Entrepreneurship  
Daffodil International University

## **Certificate of Approval**

This certifies that Tahmid Malek (221-45-025) is a regular student of the Department of Innovation & Entrepreneurship, Faculty of Business and Entrepreneurship, Daffodil International University. He has completed his Project implementation on “Implementation of Eduvisory CRM”

I have gone through the project and found the business idea feasible.

I wish him every success in life.



Professor Dr. Mohammed Masum Iqbal  
Pro Vice Chancellor,  
Daffodil International University.

## **Acknowledgment**

With the kind help of almighty Allah, I have made efforts in this project. However, it would not have been possible without the kind support and assistance of many individuals and organizations. I would like to extend my sincere thanks to all of them.

I am highly indebted to my supervisor, Professor Dr. Mohammed Masum Iqbal, Pro Vice Chancellor, Daffodil International University, for his guidance and constant supervision, for providing necessary information regarding the report, and for his support in completing the project.

I would like to express my special gratitude and thanks to Professor Md. Kamruzzaman Didar for giving me such attention and time.

## **Abstract**

The educational consultancy industry has become a mainstay of the higher education ecosystem in Bangladesh and has been catering to an increasing number of students seeking opportunity abroad. But traditional consultancy operations are often built on the back of generic spreadsheets and manual record-keeping that are not efficient and scalable. This reliance on outdated methods leads to immense operational challenges where consultancies are not able to accurately track client progress or extract actionable business insights. In this age of rapid digital transformation, this limitation poses a threat to the competitiveness and growth potential.

This project describes the implementation of Eduvisory CRM, a specialized form of Software-as-a-Service (SaaS) platform that will help transform the operations of consultancies by streamlining the unique workflow processes. The platform offers a complete framework encompassing modules to manage lead (capture and tracking of potential students), a centralized client profile (profile of a student that contains documents and communication history), and a visual dashboard (act as a monitoring tool for student's university applications status). The system also includes a rudimentary analytics engine so that owners can generate data-driven reports on conversion rates, lead sources, and staff performance.

Focusing on the context of Bangladesh, where existing professional CRMs are often overly complex for small to medium-sized firms, this project focuses on the need in the market to have user-friendly solution. The main obstacle of high cost is overcome with an ultra-lean, remote first model of operation with minimal amount of overheads. The approach of this study was to use a lean startup methodology - some sort of strategic business planning combined with agile development of the Product.

Findings from the implementation and financial analysis prove that a special CRM can have a significant impact on the efficiency, measurability, and scalability of educational consultancies. By the undertaking of this gap between the manual processes and data-driven management of clients with Eduvisory CRM stands as a dynamic and relevant tool for the continued success and relevance of consultancies in the contemporary digital ecosyste

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## **Chapter 1: Introduction**

### **1.1 Introduction**

The educational consultancy business in Bangladesh is a very crucial gateway to higher education ventures of foreign countries among the students (Bangladesh Bureau of Educational Information and Statistics (BANBEIS) (2023) - *Annual education statistics report*). The tools used in the operation of these businesses have however not changed in tandem with the growth of the sector. The sluggishness of many consultancies stems from manual work with generic software that immobilizes their performance to scale and serve the customers (Al-Jabari, M., & Abu-Shanab, E. (2020) - *Impact of CRM systems on business performance*). The proposed project, Eduvisory CRM, seeks to fill this important gap by coming up with a tailor-made, cloud-based software application. It moves a strategic business idea to a realistic, working prototype illustrating a possible direction of modernizing the working backbone of this significant industry.

### **1.2 Background of the Study**

There is also a growing demand of overseas education among the Bangladeshi students and this demand is consequently acting as a booster to the local educational consultancy industry (BANBEIS, 2023). Nevertheless, most of these companies, especially the small to medium-sized enterprises (SMEs), use poor tools such as spreadsheets or simple contact managers to facilitate their complicated processes. Such dependency will cause serious challenges in the operation such as high probability of mistakes, inability to monitor student progress and inability to follow up potential clients.

Although there are professional grade Customer Relationship Management (CRM) systems such as Salesforce, these are often expensive and extremely complex to the requirements and budget limits of these local consultancies. This puts a specific technology gap: an expanding (Kumar, V., & Reinartz, W. 2018) industry requires up-to-date technology, but cannot afford the enterprise market. Eduvisory CRM was developed to close this gap by offering a robust, easy-to-use, and affordable platform that is designed to support the processes of educational consultancies in Bangladesh (Choudhury, S., & Mallick, P. K. 2021).

### **1.3 Scope of the Study**

The area of the project is devoted to the implementation of a Minimum Viable Product (MVP) of Eduvisory CRM. The paper discusses the entire lifecycle of the process including conceptualization and business planning, up to development of a functional software prototype with basic features.

Among the areas of importance in the scope are:

- The creation of a Lead Management module to receive and manage inquiries.
- The establishment of a centralized database Student Profile.
- The adoption of a graphical Application Tracking dashboard.
- The assimilation of a background University & Course Database.
- Creation of a Simple Analytics dashboard to use in basic reporting.

Unspoken spheres that will not be covered under this implementation include:

- Advanced features such as built-in payment gateways or artificial intelligence-based predictive analytics
- Creation of indigenous mobile applications (iOS or Android).
- User testing of large scale with paying clients or commercial deployment.

### **1.4 Objective of the Study**

The main goal of this project is to create a full-fledged and working prototype of Eduvisory CRM. The specific objectives are:

To examine the operational issues and technological gaps that are currently being experienced by the educational consultancies in Bangladesh.

To build and design a special SaaS platform according to the industry-specific workflows.

To implement the core features that are necessary to manage the whole student journey, right from the lead to the end application.

To prove the feasibility of the proposed ultra-lean, bootstrapped business model by creating a detailed financial plan and operational structure.

To create a scalable and sound technical prototype which will act as a proof-of-concept for a commercially viable product.

## **1.5 Methodology of the Study**

This project used a multi-faceted methodology, using business strategy integrated with agile software development:

**Secondary Research:** The project was started with an analysis of secondary data such as market reports and industry statistics to identify and validate the market gap for specialised CRM software.

**Strategic Planning:** A detailed business model was created based on the Business Model Canvas framework, followed by a strategic financial plan to make the venture feasible and sustainable.

**Lean Development:** Lean startup and agile development were followed for the implementation phase. This methodology is very suitable for the remote-first, two-founder model and can be used for rapid prototyping, iterative development, and effective resource allocation.

**Systematic Documentation:** Throughout the project, key documents were prepared including Business Model Innovation Report , Financial Plan , Standard Operating Procedures (SOPs) to have a strong and well-documented project foundation.

## **1.6 Limitations of the Study**

While the project was successful in achieving its objectives, it is important to point out the limitations:

Data Source: The initial market analysis has been taken from secondary data. There was no large-scale primary research carried out such as surveys or in-depth interviews with a wide range of consultancy owners.

MVP Focus: The end deliverable is an MVP While it does show the core functionality and technical viability of Eduvisory CRM, it is not a fully commercial grade product, and does not have some of the advanced functionality and polish of a market release.

Lack of Live Market Testing: The success of the project is measured from the working prototype and its consistency with the financial plan. It lacks the information of not more than 6 months that results from live market testing with actual paying customers in order to validate adoption rates of users and revenue projections in a real-world scenario.

## Chapter 2: Assess Existing Services and Market Gaps

### 2.1 Introduction

This chapter describes a thorough evaluation of the current business management solutions adopted by and for educational consultancies in Bangladesh. The analysis is conducted with an emphasis on identifying the tools that are prevailing, their inherent strengths, weaknesses, and identifying the specific gaps in the market due to the shortcomings of these tools. The current market is plagued by the absence of truly specialized, user-friendly and cost-effective CRM offerings, which forces many companies to rely on generic or inferior tools (Choudhury, S., & Mallick, P. K. (2021)). This assessment is important to put in perspective the necessity for a platform built specifically to meet the need and shows the possibilities that Eduvisory CRM is built to address.

### 2.2 Overview of Existing Services

The current scenario of the tools used by educational consultancies in Bangladesh can be broadly classified into three different groups:

**Generic and Manual Tools:** For small to medium-sized firms, the most common approach is the use of generic software that has not been tailored for consultancy works. This can include tools like Excel spreadsheets, Google Sheets, or basic digital managers. These methods are generally marked by manual data processing and siloed processes.

**Professional, Generic CRM Solutions:** A smaller segment of the market may try to use professional grade generic CRM platforms like Salesforce or HubSpot CRM. These systems are powerful but are geared towards large general purpose sales teams rather than the niche market of educational consulting (Gartner, Inc. (2024) - *CRM market guide: Trends and insights for small to medium businesses*).

**Niche or Industry-Specific CRMs:** The third type of CRM is those that are specifically targeted towards the education industry. However, these solutions are usually not tailored enough for the specific workflows of a consultancy (Gartner, Inc. (2024)). They are often not fully automated (they still need to be manually fed with leads), and are also weak in offering the more advanced auditing or analytical tools required for effective management oversight.

## **2.3 Service Strengths and Weaknesses**

Each class of existing services has a different set of strengths and weaknesses to the user.

### **Generic and Manual Tools:**

**Strengths:** The main strengths of these tools are that they are cheap to start and are widely available. They are very easy to use as most users have experience with spreadsheet applications.

**Disadvantages:** Their use creates major operational problems. These processes are inefficient, error-prone and do not scale as the business expands.

### **Professional, General CRM Systems:**

**Strengths:** These systems are powerful, comprehensive, and scalable, with a vast ranges of tools for sales and marketing automation.

**Disadvantages:** These solutions are very expensive from the perspective of small and medium-sized local consultancies. Furthermore, they are often too complicated and have a steep learning curve and need extensive training, thus using valuable time and resources (Gartner, Inc. (2024)).

### **Niche or Vertical Specific CRMs:**

**Strengths:** The main strength is that they are more relevant thematically than a generic CRM, and offer a better starting point for users of the industry.

**Weaknesses:** They are sometimes just a reskinned generic CRM, and do not provide truly deep specialization. The main deficiencies are the absence of automated lead capture systems, inadequate management audit systems, and simple analytical capabilities.

## 2.4 Unmet Needs and Consultancy Preferences

The weaknesses of all of the solutions available highlight a number of critical needs that are not being met in the educational consultancy market.

**Need for a Truly Specialized Solution:** Consultancy owners need a tool to be created specifically for their workflow and not a generic tool or a lightly customized niche product.

**Need for Value-Driven Solution:** Consultancies require a professional-grade tool that has a pricing model that fits the financial realities of SMEs with a clear return on investment.

**Need for Simplicity and Quick Adoption:** Users have a strong preference for an intuitive platform that can be quickly adopted and requires little training. The need to avoid a lengthy and complex onboarding process is a significant preference to busy teams.

**Need for Actionable, In-Depth Insights:** A major unmet need is to have access to a clear, centralized view of business performance with robust analytics and auditing capabilities - something that all current options are failing to provide adequately.

## 2.5 Opportunities for Differentiation

The identified gaps and unmet needs in the market provide clear value differentiation opportunities for Eduvisory CRM.

**Deep Specialization and Workflow Automation:** The main opportunity is to provide a SaaS with deep workflow-specific features that go far beyond what niche CRMs do, but don't go far enough to provide the necessary deep features for the majority of the other market. By being integrated directly with lead sources such as Meta Lead forms and being able to use QR codes for walk-in student registration, the CRM is truly automated, which is not the case with competitors.

**Superior User Experience for Rapid Adoption:** There is a tremendous opportunity to develop a platform which is intuitive and user-friendly for rapid adoption with minimal training. This is a direct opposite to existing enterprise and niche CRMs which are complex and take long to onboard.

**Affordable Pricing Model:** The lean and remote-first operating model opens up an opportunity to price the platform competitively, taking away the high financial barrier to entry that enterprise systems have created and bringing powerful technology to the mainstream.

**Advanced Analytics and Auditing:** One of the differentiators is the addition of an advanced auditing system for managers. This feature directly addresses a weakness in other niche CRMs by giving managers a clear picture of all counselor activities and data changes. This degree of control, together with powerful analytics, gives us unparalleled visibility and control.

## Chapter 3: Proposed System and Architecture

### 3.1 Introduction

This chapter puts forth the proposed system design of Eduvisory CRM. It converts the opportunities that were identified, into a specific software architecture and feature set. The proposed system is a cutting-edge, cloud-native SaaS platform that is built from scratch to be specialized, easy-to-use, and scalable, which directly tackles the shortcomings of current tools. This chapter will outline the high-level architecture of the system, its main functional modules, the UI/UX philosophy of the system, and the technology stack.

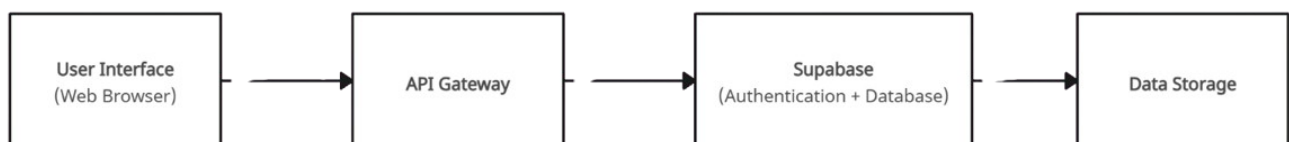
### 3.2 System Architecture

The technical basis of Eduvisory CRM.

**High-level Description of the Proposed System:** The proposed system is based on client-server architecture. A modern responsive frontend client (web application) will interact with a robust backend for all data management.

**Backend-as-a-Service (BaaS) Model:** The architecture will be based on the BaaS provider to ensure rapid development and cost-efficiency. Supabase was chosen for its integrated toolkit of technologies such as a Postgres database, authentication and auto-generated APIs, which fits perfectly with the project's lean operating model (Supabase (2025) - *Supabase documentation*).

**Data Flow:** Data Flow can be described as the process of capturing the data from the lead source via automated means (Meta forms, QR codes), storing the data in the central database and finally delivering the data via the analytics and auditing dashboards.



### **3.3 Core Modules and Features**

**Automated Lead Management Module:** This module is designed to capture and manage prospective students. It will have direct API integration with Meta Lead forms as well as a QR code generation system for walk-in registrations, so that all leads go into the CRM automatically and without manual error.

**Intelligent Lead Assignment:** On entry, leads will be automatically assigned to the appropriate counselor according to predefined rules (i.e. selected country of interest by the student).

**Centralized Student Profile Module:** A full student profile database to store all critical student information including personal details, communication history, academic records, and uploaded documents.

**Visual Application Tracking Dashboard:** An easy-to-use, Kanban-style application tracking board to monitor the status of every student's applications across multiple universities

**Advanced Analytics and Auditing Module:** This module offers a two-fold function. For the counselors, it provides easy reports on personal performance. For managers, it is an advanced auditing system to enable a full record of user activities, data changes, and communication history to ensure transparency and process compliance.

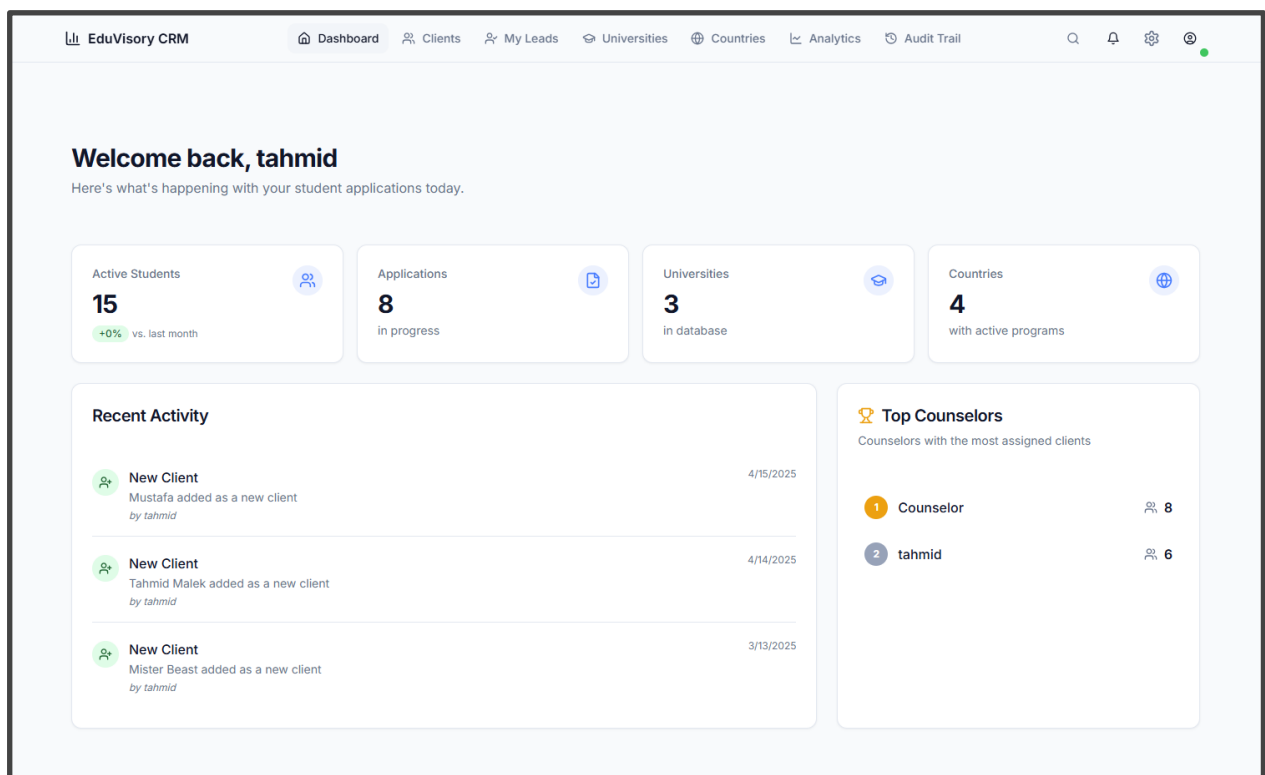
### 3.4 UI/UX Design Philosophy

Principles that will inform the user interface and experience which is one of the main points of distinction of the project.

**Ease of Use and Quick Training:** The main design consideration is to design an interface that is user friendly and needs minimum training. This is a direct contrast to other competing enterprise CRMs that are complicated and hard to learn.

**Workflow-Centric Design:** Each screen and functionality will be created to reflect the real daily workflow of an educational consultant and the user experience will be natural and effective.

**Clarity and Data Visualization:** Data will be presented using clean and easily comprehensible charts and graphs as dashboards and reports and this will allow users to have a glimpse of what it entails.



### 3.5 Technical Specifications

The technologies that will be used in the construction of the proposed system.

**Backend:** Supabase (PostgreSQL, Authentication, Auto-generated APIs).

**Frontend:** A single-page application (SPA) is going to be developed on a modern JavaScript framework (e.g., React, Vue.js, or Svelte). Tailwind CSS will be used to do the styling.

**Development Environment:** The main code editor that will be used in the development will be Cursor, a fork of Visual Studio Code with multiple AI Integration.

## Chapter 4: Strategies for Sustainable and Scalable Growth

### 4.1 Introduction

Strategies aimed to make Eduvisory CRM successful in the long-term. Having passed the first implementation stage, the center of attention is a detailed outlay on sustainable and scalable expansion. This will comprise an aggressive market penetration approach, a well-defined product development timeline, and solid sustainability and scalability of the operations strategy of financial sustainability. It will target to expand the lean foundation of the project and gain a substantial market share in order to make Eduvisory CRM an authoritative technology partner of the educational consultancies in Bangladesh.

### 4.2 Market Penetration Strategy

The go-to-market strategy would be efficient to capture the intended market of small to medium sized educational consultancies in Bangladesh through a gradual process that focuses on validation first and scaling second.

**Phase 1: Networking-based First Market Introduction:** The first approach was aimed at making use of good personal and business connections to reach the first wave of customers. At this stage, there was an opportunity to offer early adopters a white-labeled variant of the CRM to be launched on their own hosting servers. The subscription based model also resulted in close working relationships, whereby useful feedback of the user and creating of case studies was possible at minimal startup costs as far as marketing is concerned.

**Phase 2: Digital Marketing and Online Sales:** After the product has been tested on the initial network-based customers, the plan will be to scale the acquisition of the customers. This will involve:

**Lean Digital Marketing:** This will be done through launching a specific digital marketing campaign, aimed at attracting more people, as the consultancy owners, and managers, with the help of targeted advertising.

**Direct Online Sales:** The company site will be expanded into the primary sales and onboarding channel that will allow a low-contact conversion process to grow the business on a small scale.

### 4.3 Product Development Roadmap

The product approach is in the form of continuous innovation and adding high-value features that enhance the competitive edge of the platform. The roadmap is organized into different stages, marking on the achievements and goals to be achieved.

**Phase 1: Establishment Implementation (Complete):** The first phase involved the development of a solid platform with functionality and features that meet the fundamental requirements of educational consultancies. All the required modules have been integrated successfully such as:

**Core Operations:** Standard lead management, student profiles and applications tracking systems.

**State of the art Automation and oversight:** Automated Lead Capture through Meta forms and QR codes, Smart Lead Assignment to counselors and a more advanced audit system that managers can use.

**Phase 2: Optimization of Experience and Performance (Next Steps):** After having the basic feature set, the next development cycle will be on improving the user experience and providing long-term performance. The key priorities are:

**UI/UX Improvement:** A detailed inspection and optimization of the platform in terms of appearance. This includes polishing the user interface and the general user experience to enhance the visual appeal, workflow and usability.

**Backend Performance Optimization:** Performance optimization through the implementation of advanced data compression and other optimizations at the backend to guarantee that the platform is fast, quick and economical to maintain as the number of users data continue to rise.

**Phase 3: Ecosystem Expansion (Long-Term Vision):** Future expansion will aim at extending the services offered by the platform to provide a full ecosystem of consultancies. This involves investigating in the following features:

- Onsite payment gateway service fee integration.
- Specific counselor mobile app.

- More advanced, smart analytics of predictive insights.

#### **4.4 Operational Scalability Strategy**

The operational model has been designed in a ground-up way which has brought scalability to the model such that as soon as the business increases its client base, there is no proportional increase in complexity and cost.

**Technology Stack:** A current, cloud-based BaaS provider such as Supabase will guarantee that the technical foundation is capable of scaling without much startup capital to serve more users and data.

**Standard Processes:** The initial formation of Standard Operating Procedures (SOPs) of core financial and future HR operations (such as the Future Contractor/Employee Hiring SOP) gives rise to a documented operation framework. This will make sure that as the team grows processes are consistent and efficient so that operations are not bottlenecked.

## Chapter 5: Financial Projections & Funding Requirements

The strategic objectives into a tangible financial plan. It gives a realistic projection of the growth in the following three years which shows viability and profitability of the venture in the long run. The following projections are based on a self-funded, bootstrapped model, in which the profits of the current year are strategically reinvested in order to drive the next growth.

### 5.1 Financial Projections (3-Year Forecast)

This business model is based on an aggregate of straightforward and conservative assumptions, which will create a strong base before expanding to Software as a Service (SaaS) business in its entirety.

#### Annual Fixed Cost:

Description	Amount (BDT)
Internet	25,200
Base Subscriptions (Supabase, Cursor)	64,000
Domain & Hosting	50,800
Total Fixed Cost	140,000

#### Key Assumptions:

**Subscriber Growth:** The strategic focus is to gain and maintain a small group of high-value subscribers, and the business will be determined by the number of active subscribers at the end of the year.

**Year 1:** To end the year with total number of 2 subscribers.

**Year 2:** Add 3 subscribers bringing the total to 5 at the end of the year.

**Year 3:** This will add 4 new subscribers to have a total of 9 at the end of the year.

### Revenue Streams:

**Subscription Revenue:** Subscription fee will be fixed at 20,000 BDT per month in order to have a consistent predictable revenue stream.

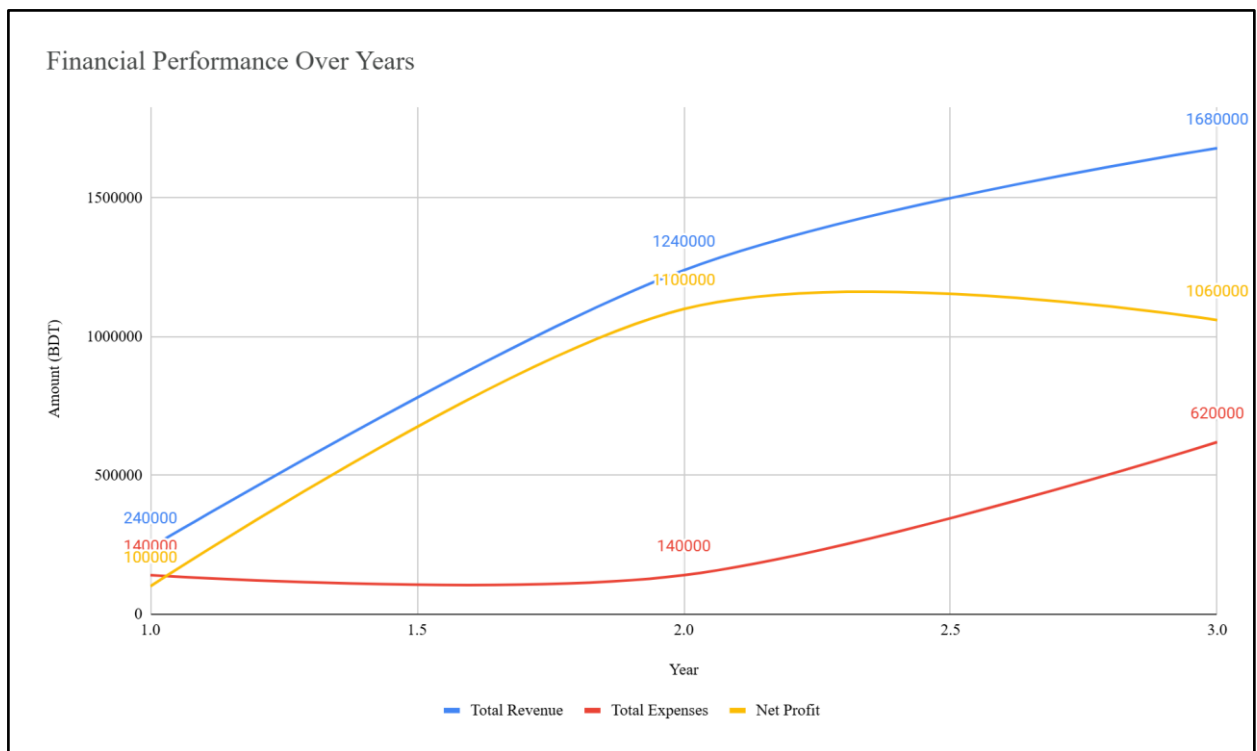
**Software Sale:** A one and once software license sale will be in the Year 2 and is estimated to be 400,000 BDT that will provide a lot of capital

### Operating Costs:

**Base Costs:** Base Annual lean operation cost is 140,000 BDT.

**Strategic Hire:** One of the critical full-time developers will be recruited during the Years 3 and the money will be provided by high-profit growth in Years 2.

Financial Metric	Year 1 (Forecast)	Year 2 (orecast)	Year 3 (Forecast)
Revenue			
Subscription Revenue	240,000 BDT	840,000 BDT	1,680,000 BDT
Software Sale Revenue	0 BDT	400,000 BDT	0 BDT
Total Revenue	240,000 BDT	1,240,000 BDT	1,680,000 BDT
Expenses			
Base Operating Costs	140,000 BDT	140,000 BDT	160,000 BDT
New Hires (Salaries)	0 BDT	0 BDT	360,000 BDT
Infrastructure & Marketing	0 BDT	0 BDT	100,000 BDT
Total Expenses	140,000 BDT	140,000 BDT	620,000 BDT
Net Profit	100,000 BDT	1,100,000 BDT	1,060,000 BDT



## 5.2 Use of Funds: A Bootstrapped Reinvestment Plan

The growth will be entirely self-financed (bootstrapped). It is not seeking external investment. Direct funding of capital allocation will be made available out of 1,100,000BDT of the operating profit of Year 2. The first aim of this reinvestment is to move the product to a scalable, real Software as a Service (SaaS) platform in Year 3.

The financial plan is to be divided into the following:

**Technical Development (360,000 BDT):** This is the entire amount of money paid annually to a competent, offshore software developer. The developer will mostly be involved in the re-architecture of the software to be used in a multi-tenant cloud environment.

**Infrastructure and Marketing (240,000 BDT):** A substantial amount of money will be used on obtaining a solid cloud hosting infrastructure and on investing in a specific marketing campaign to introduce the new SaaS platform.

**Retained Earnings (500,000 BDT):** The profit will be retained in large amounts as a capital reserve. This gives it a high financial cushion, stability in business, and enables future strategic opportunities.

### **5.3 Key Metrics & KPIs**

The following Key Performance Indicators (KPIs) will be strictly monitored to keep an eye on the well-being of the business and the effectiveness of the strategy.

Monthly Recurring Revenue (MRR): This is the most important measure of a subscription business which measures the monthly predictable revenue.

Customer Acquisition Cost (CAC): this refers to the average cost of acquiring a new subscriber and the aim is to keep this cost low by the use of effective marketing and referral programs.

Customer Lifetime Value (LTV): This projection is the total amount of revenue one customer will bring in before he or she cancels (churns). A strong business will be looking at an LTV of at least three times CAC.

Churn Rate: This is the percentage of subscribers who cancel their service after three months and it is necessary to keep this rate to the lowest possible rate so as to achieve the long term growth sustainability.

## Chapter 6: Strategic Implications & Conclusion

The strategic and financial frameworks are implemented and this is the ultimate confirmation of the business model. This final analysis will not stop at the planning stage, but will look at the practical implications and the overall long-term consequences of the implementation of the suggested course of action. It is centered on the estimated sustainability of the venture, the resulting market position, and its operational preparedness and a conclusive, proactive evaluation.

### 6.1 Implications

Effective implementation of the plan described in this paper will impact the business in a major transformative way that will generate concrete value and provide a justifiable market presence. Every element of the plan has a greater strategic result.

**Self-Sufficiency as a Financial Resilience:** The bootstrapped model creates a cycle of financial resilience on a massive level where the large profit that is projected in Year 2 is used to finance the major investments in Year 3. This proactive approach has the benefit of building a self-sufficient business that is not burdened by the demands and constraints of external financing. The decision to save a large share of the future earnings as a capital reserve will create a powerful financial buffer to the business enabling it to overcome unexpected market pressures and invest in new opportunities positionally.

**A Basic Business Model Change:** The main message behind this plan is the transformation of a service-based software vendor to a modern and scalable Software as a Service (SaaS) business. This is essentially a paradigm shift of what could be considered a transactional and unpredictable model of revenue and high per-client loads of service to a predictable Monthly Recurring Revenue (MRR). The SaaS model gives the company an enormous level of operational leverage that allows it to serve more clients without a corresponding increase in expenses, which opens the potential of geometric growth and a much higher enterprise valuation.

**Development of Proprietary Intellectual Property (IP):** The operational step of hiring a remote developer to create a multi-tenant cloud environment is not just the beginning of a

valuable and defensible proprietary asset. The resultant SaaS platform its architecture, features, and underlying code is a unique intellectual property of the company. This changes the essence of value the company has been offering as a service to the value of the unique technology that the company owns and forms a vital asset in long term value creation, possible partnerships or in future strategic acquisitions.

**Development of a Defensible Market Position:** At the expiry of the three-year forecast period, the company will be operating as an established and profitable organization in its selected niche, as opposed to a newcomer in the market. The strategy takes the company outside of the phase of idea to an operation that has a proven track record. A small circle of premium, paying subscribers will also be essential social demonstration and will form the foundation of effective case studies, which will further reduce the resistance to sales and cement the image of the company as a trustworthy and trustworthy participant in the market.

**Building of a Sustainable Competitive Advantage:** The commitment to lean operations and profitability since the beginning would create a core competitive advantage. This disciplined methodology gives the strategic patience to develop step by step without the hyper-growth pressures that external investors tend to place upon it. The business is then free to pay special attention to the attainment of the real product-market fit, better product quality, and excellence in customer satisfaction. These factors will create high retention rates and referral, which will be a strong competitive moat that is long-term.

**Operational Maturity Achievement:** This plan requires and inculcates a new level of operational maturity to execute the plan. The role played by the founder will automatically transform to handling of all activities to handling of organized systems of product development, sales, and customer care. This shift includes the development and optimization of repeatable processes, which is the characteristic of a business that is really scalable. This internal structure maturation of the company is a necessity to enable the company to develop a strong base that can accommodate a much bigger and more demanding customer base in the future.

## **6.2 Conclusion**

The discussion in this report is a strategic and financial model that will result in the development of a self-sustainable enterprise. The information shows that the venture is not only sustainable, but it is poised to become profitable over time and withstand the market.

According to the intensive financial analysis, the business has been established to be financially viable. Bootstrapped funding model is being defined as one of the core strategic assets, which will guarantee the full operational autonomy and isolate the venture on the background of the market pressure that the competitors funded externally can usually experience. The forecasts affirm that the business plan has a clear and attainable road to profitability per annum during the entire forecast period.

The implementation of the mentioned strategy will ensure a sustainable long-term market presence of the company. The key pillar of this positioning is the planned shift to a proprietary Software as a Service (SaaS) platform as opposed to the service-based offering. This development lays the foundation of scalable revenue model and most importantly, it leads to the generation of valuable intellectual property, which ensures that the company is in the competitive position.

Thus, it is up to the conclusion of the given report that the business plan is strong, viable, and strategically sound. This report concludes that the implementation conditions are good and highly gives a recommendation that the strategic plan should be adopted. The discussion justifies the initiation of the implementation of Year 1 goals as of this date, and the acquisition of the base of subscribers is of immediate concern.

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# 221-45-025

*by* Tahmid Malek

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