BRITÂNIA

Diagnosis and Evolution of an Existing CRM Project

Visionnaire validated the existing code and structured the modular evolution to complete the development of a CRM

In mid-2020, Britânia (which today also owns the Philco brand in Brazil) had been developing, with another vendor, a new CRM (Customer Relationship Management) to centralize relationships with customers and leads (contacts, interaction history, opportunities, proposals, orders, and support), but development was interrupted. As a result, the company needed a consultancy to evaluate what already existed and confirm the feasibility of continuing the project based on the delivered code. The challenge took place during the 2020 pandemic (and therefore required online solutions) and during Britânia's transition to agile practices, demanding a balance between speed and governance. In addition, it was necessary to understand a reference tool, elicit requirements without "reinventing the wheel," respect the company's development standards to facilitate maintenance/bringing it in-house, and define a robust and modular architecture, despite the scope still being insufficiently detailed and the risk of inaccurate estimates.

To address this, Visionnaire started with an assessment of the source code produced by the previous vendor under four perspectives: Architecture, UI/UX, Frameworks (Node.js/React), and Management.

The assessment involved team meetings, demonstrations of the system in its current state, virtual and in-person sessions, visits to the factories in Joinville-SC, and on-site follow-up of tool usage, culminating in presentations of conclusions. In the end, it was confirmed that it was possible to continue development based on the existing code. With validation and the requirements/technical definition work, the project moved on to prototyping and development, with Visionnaire supporting Britânia's internal team until the client assumed continuity.

As a result, Britânia was able to complete the CRM that had been stalled, saving money by reusing what had already been built and with a safer foundation for future evolution.

The case also highlights productivity gains and cost reductions through a specialized team and agile, cloud-based processes, using Scrum and weekly sprints.

Technologically, the system used JavaScript (Node.js) with NestJS, React, and Redux; a Microsoft SQL Server database (with occasional NoSQL usage); integration with TOTVS; and hosting on Britânia's servers.

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