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| [Company name] |
| CRM SYSTEM |
| [Document subtitle] |

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# Description of customer\client:

* Federated Insurance - Marketing department
* They sell insurance policies to individuals (such as life insurance) and to business owners (such as business\property insurance)
* Their mission “As a mutual insurance company, we believe our value is measured by the success of our clients. It’s our business to protect yours.”
* The system users are RMM (regional marketing manager), DMM (district marketing manager), MR (Marketing representative).
* The company biggest key value that drives people to switch to federated insurance is their risk management. Departments that prevents the businesses that the company insures from running out of business if a big claim happened. And that why our insurance is higher than others, but we can guarantee your business will be active for a long time.

# Fact-finding preparation:

1. User group structure:

* Regional Marketing Manager: [Full access (read and write)]
* District marketing manager: [Full access (read and write his district]
* Home office Marketing: [access to database just to read]
* Marketing Representative: [read, write and update his/her individual portal]

1. MR will have their own territory and they are restricted to own territory. (1:1 MR to territory)
2. Two types of client: Insured or not insured
3. Status of Customers:

* Insured
* Prospect
* Uninsurable
* Top 100
* Top Prospects – they wanted to know everything about their family members, birthdays, anniversaries, etc. for showing how much their company cares about their clients or prospects. Also, know who is going to be the future owner after the retirement of the present owner.

Shankar Fact-findings

1. Data needed from a customer:
   * Company Name
   * Email Address
   * Telephone – should have description column to take notes about their conversation in the phone. This helps him to identify the level of prospects, insured or uninsurable.
   * Classes of Business.
     + Auto and Truck Dealers
     + Auto parts stores
     + Building materials dealers
     + Cabinet and custom woodworking shops
     + Contractors
     + Equipment Dealers
     + Funeral services professionals
     + Jewelers
     + Machine and tooling operations
     + Petroleum Marketers
     + Petroleum Transport
     + Printers
     + Tire dealers
2. A customer should be in assigned territory – territory has a 4-digit numbering system.
3. The system should have meeting scheduling feature, Reminder, and birthday tracking feature.
4. Notification to MR about the prospective customer's policy expiration date
   * Notification period: 3 Months, 2 months and 1 month before policy expire.
5. The system should be mobile friendly.
6. If company ownership changes store the old client data and update new client.
7. Calculate the commission for each marketer based on their sales.

Yogendra Fact-findings

Federated Insurance

* 325 IT shop US wide.
* 2200 employees total

**Primary to business, property, and casualty (What does the insurance covers?)**

* + Property side: any physical side of the business gets help if any damages
  + Casualty side: Like medical expenses of employees if that company is insured under federated.
* Does not insure every type of business.
* **70-80% of business is helped by some associations and help find them the prospects. So, include valuable associations to ERD as an entity or field.**
* **Marketers need Outlook for email.**

**Types of Marketers**

* + Regional Marketing manager -- ***Top***
  + District Marketing manager -- ***Middle***
  + MR – ***Most general***
* For life insurance -- anyone can get it.
* **Client**
  + Insured,
  + top 100,
  + prospects,
  + uninsurable – all those in the business side, because life insurances are given to anyone who wants, unlike businesses.
* Take notes about everything he gets from customers. Like how the phone call went.
* Looks after the expiration date and keep in touch with prospects if they were insured somewhere else.
* Not a cheap insurance. But have a good risk management.
* Recommends a phone app to make the handling more portable and quick.
* Need to know everything about the prospects like the owner, their family members, etc.
* Also, need to have the old ownership information and new ownership information if it is subject to change.

**Salem Wafi Fact-Finding**

* The priority of the new system is for the business owners (or who represents them) either they are potential/current insurers.
* For the potential/current insurers, the system should serve the company main focus that keeps their business success and growth which is the risk management where they try to avoid the losses that could happen for their insurers.  
   Ex: alerts to MRs for a periodic visit to their clients’ businesses for observations of risk acts.

Federated Insurance Risk Management:   
The company biggest key value that drives people to switch to federated insurance is their risk management Department that prevents the businesses that the company insures from running out of business if a big claim happened. And that why our insurance is higher than others, but we can guarantee your business will be active for a long time.

* The system should be unified in terms of usage. All users should be using the system in the same way according to their title and access level (MRs, DMMs, and RMMs).
* Security: MRs shouldn’t see each other customers, (DMMs) should have read/write access to all of the MRs they supervise. RMMs should have read/write access to all the DMMs that they supervise.
* Information of potential/current insurers that the MR should be able to save it in the system (the database of the system):

Company name, name individual, birthday date to send birthday cards, their current policy expiration data (you can get it by initial convo “hi I know you may not be interested to hear about other business insurance offers now but could you tell me when is your current policy expires so I can reach you out few months before then?”) and notify the MR 4 months earlier, email, the competitor that they have policy with, phone, address, and note section about the company or the person, type/industry of business.

What we do with top prospects AKA potential insurers?  
Start making phone calls, and try to schedule meetings with them, take them out for lunch if you get to meet them (and take notes and record all the info about those events in the new system)

When do I contact them?   
This is the struggle today, (the expiration date of their current policy is the key) three months before the expiration date for example.

The following tasks that each MR should do with his current insurers and mark them as done in the system whenever a meeting is scheduled and attended for them, then report that to your DMM:   
4 times a year need to meet with our clients, and these meetings are:

1. Risk control review
2. Financial protection review (how much money left in the policy)
3. Annual client review (for any change in their industry)
4. Client map review.

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How/what changes in data affects the system? --- Does anyone have an idea about it?

# Results of Fact-Finding:

# Project Scope and Recommendations:

* This project will develop a new application system for Federated Insurance. In this application system, the user will be able to connect to a database and view clients’ information’s, schedule appointments, get alerts on several things, write general notes all while being integrated with Microsoft outlook.

# Project Schedule:

# Feasibility Analysis: