**Fact-Finding Preparation**

**Questions:**

1. What do you think about the CRM level of Federated Insurance Company?
2. What needs to be updated or developed in your company’s CRM system, in your opinion?
3. How does your insurance company work? What are your general policies?
4. How do you find your clients? Do you go door to door, do they come to your company or what else?
5. For any reasons, do you cancel your clients’ insurance policy?
6. What work tittles do the employees from your company have? Explain if certain category of employee has subtypes.
7. How is the insurance you provide for business different from life insurance? What are the difference in policy and what criteria do they should have to be insured under you?
8. What does a life at your work place look like? How often are you working with your current system and mostly, what do you do?
9. What policy changes your company goes through most often? How does it affect your present clients and prospects?
10. Did your company tried to develop a new system? What do you expect this new system to bring and develop?
11. What are your priorities for the CRM system’s platform? (browser, integrated with outlook, tablet app, and mobile apps).

**Memo:**

To: Federated Insurance

From: IT 380 Project Group-1

Date: February 10, 2018

Subject: Source Documents and further clarification

We did a great, collecting the information from your presentation and question answer round. The presentation helped us gather some useful information also gave us brief overview what you expect from the new system.

Even though it seems we have everything we need to develop a CRM system, we might need to change what we caught from the presentation. It would be great if you provide us a brief description of the overall expectation from the system. Also, please include some samples of source documents like customer records, and employees’ records which will help us build more efficient, smooth and complete system.

Please understand we are trying to make the system better than we can make it with the information we have right now. Any documents that seems helpful is more than appreciated.

**Survey Questionnaires**

1. What types of visual effects do you prefer in your Dashboard? If you have example, provide us some.
2. Should there be different access level for employee with major rank differences? What access differences should a low ranked employee and higher ranked employee?
3. What are the available hardware where data from CRM can be stored?
4. Are you willing to allow third parties to your system to add more function to it like data security?
5. What software do you prefer for emails, suggest if you have some specific preference or specific function you need in the software?
6. Explain the different types of clients.