Project goal:

Supporting the critical relationship between the MR and our customer by using the CRM system. The CRM system will be the MRs primary system they use on a daily basis to keep tracking their customers records more efficiently.

Project scope details

* Build a dashboard which gives an overview of all the important details such as gauge indicator which shows the MRs long/short term goals, events coming soon, reminders (reminders for scheduled key meetings flagged in the calendar, policy expiration date so the MR can send an email to the customer to request a meeting to discuss about renewing the policy).
* Build a foundation for the master customer record.
  + Should work for prospects and insureds.
  + Should have customer type field (prospects or insureds) to use it later to add more fields related to the prospects or insureds only.
  + Insured customers should have fields for the four pre-flagged annual meetings which are:
    - risk control review.
    - financial protection review (how much money left in the policy).
    - annual client review (for any change in their industry specialty).
    - client map review.
* Have the ability in the system to prioritize your customers and group them as:
  + Insured customers the MR interested to offer them a policy again after their current policy expires due to the safe practices that happens at their businesses (based on the four annual meetings outcomes)
  + Insured customers the MR not interested to offer them a policy again after their current policy expires due to the risky practices that happens at their businesses (based on the four annual meetings outcomes)
  + Prospective customers the MR interested to offer their business a policy due to the notes that had been taken about them either directly through face-to-face meeting or through the MR investigations.
  + Prospective customers the MR not interested to offer them a policy due to the notes that had been taken about their business either directly through face-to-face meeting or through the MR investigations (basically because of the huge amount of the risky practices that happens at their businesses
* Build a functionality in the system to allow the MRs, DMMs, RMMs to generate different reports such as Financial analysis report, and Client statistic report (see Fact-findings file for more details).
* The security levels are as follow:
  + Regional Marketing Manager: [Full access (read and write only within assigned region)]
  + District marketing manager: [Full access (read and write only within assigned district]
  + Home office Marketing: [Limited access (read only within assigned territory)]
  + Marketing Representative: [Full access (read, write only within assigned territory)]

Out of scope:

* Outlook integration for the calendar and the emails.
* Auto send master emails and notices that the Policy management department able to set to his current insureds such as bill reminder notice.

Project Constrains:

* The system application must be web application.
* The project time frame is 2.5 months.

Project Deliverables:

* Requirements
* Design specifications
* Prototype of the CRM system and its different functionalities.
* Architecture design document.
* Deployment plan
* Training materials