**Questionnaire**

**Baruch College CIS9000 Information Technology Strategy**

**IS Department Management**

1. How is the IT team structure? (headcount (18), structure (below), and etc.)
2. What is the governance model for decisions around IS?
3. Who is the final decision maker?
4. Does the board have to approve?
5. Who was the decision maker while choosing the system?
6. Who makes the CRM purchase decision?
7. Is it one person or several?
8. How many people use the CRM System?
9. Do you think it is necessary to track this?

**System related question**

1. When did we purchase this system?
2. Which version do we have?
3. Is this CRM customizable?
4. Has the system ever been upgraded?
5. Did the company need a change management plan when implementing the CRM?
6. How compatible is the current CRM system with the company’s IS infrastructure (overall technology used in the company?

**Cost**

1. How much is the system costing to the company right now?
2. Which department is paying for this system? Is this an overhead cost?

* Who uses these systems?
* Yearly budget allocated to CRM development/ management? Is it based on yearly revenues?

1. Was there any implementation cost? Or how many IT staff was needed for this system implementation?
2. Does the team need to spend a great deal of resources (staff or cost) in maintaining the CRM system?
3. Who were some of the people involved both internally and externally?

**Users**

1. Who has access to the CRM system in law firm?
2. Can you please share with us under what occasions do you use the CRM system for?
3. Does the system do anything other than keeping contact?
4. Do you have to update the contact information manually?
5. What do the attorney’s think of using this system to directly update their client information?
6. What are some of the levels of access?
7. What are the key issues employees are facing with the CRM system?
8. What are some of the complaints about the CRM system?

**Training**

1. Is there any training designed for the CRM system?
2. Have the IT team ever gotten any request for CRM training?

**Strategy**

1. What is the goal of choosing a CRM system for ABC Law firm? Is it benefiting accordingly?
2. What business goals need to be achieved with this system? What’s the business rationale behind the system? Is this effective? Why or why not?
3. How do attorneys or marketing staff contact customers?
4. Why did we start using ConcepSend instead of Microsoft Dynamics CRM?