Federated Insurance CRM System

Notes:

- Need Cost Benefit Analysis

- Need Break Even Point

Phase 1 of the Updated Customer Relationship Management System

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PURPOSE

This *Project Charter* presents the preliminary findings of my investigation into the feasibility of your project to update the current CRM system to replace aging technology. By maintaining customer data whilst making it easier for the sale reps to access database information. This report also outlines my proposal for the procedures and schedule to be followed during this project. If you find any discrepancies or misconceptions, please bring them to my immediate attention.

PRELIMINARY FINDINGS AND ANALYSIS

After a brief, preliminary investigation of the system being studied, I offer the following observations and initial analysis. While limited access to the current system there was not much that we could come up with during discovery. Although through talks with the client we have discovered generally requirements such as:

- A preferred user interface

- User friendly

- The scope of the project

- One centralized hub to accomplish all task from

Project Description

There is currently a customer relationship management system in place that needs to be replaced due to aging technology. The current CRM system needs to be replaced with a better user interface along with being connected to the database to make it as easy on the sales rep as we can. The purpose of the project is to put everything in one location to make everyday tasks easier.

History Leading to this Project Proposal.

Scope of this Project. In the coming weeks, I will be carefully analyzing the project's scope to define a reasonable target and schedule. In the meantime, my preliminary definition is as follows:

- Integrate a CRM system
- Create a database for client profiles.
- Create a user efficient system?
  Create an ERD / Database
  Creating an Interface Dashboard

The project will address the following business functions:

1. Client
2. Time management

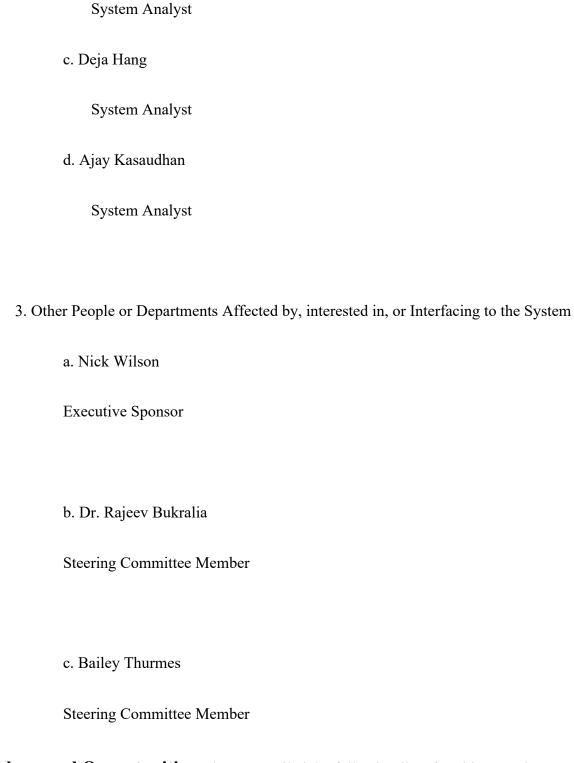3. Calendar Integration w/ time management

Project Environment

This section of the survey describes the project environment in terms of project participants, problems, and opportunities to be addressed, and project constraints that will or may limit eventual solutions. **Figure 1** represents a context diagram of the current system.

Project Participants. To date, I have identified the following list of participants for this project. Please inform me of any potential omissions.

1. Management - Direct Users or Managers of the System

a. Cayden Lovett

Project Manager

2. Non-Management - Direct Users of the System

a. Ryan Firl

System Analyst

b. Kyle Lim

System Analyst

c. Deja Hang

System Analyst

d. Ajay Kasaudhan

System Analyst

3. Other People or Departments Affected by, interested in, or Interfacing to the System

a. Nick Wilson

Executive Sponsor

b. Dr. Rajeev Bukralia

Steering Committee Member

c. Bailey Thurmes

Steering Committee Member

Problems and Opportunities. I have compiled the following list of problems and opportunities to be addressed in the project. The list is not final. In the coming weeks, I will modify the list and provide you with a detailed analysis of problems, opportunities, and

solutions. At any time during this project, you should feel free to add to, subtract from, or expand upon this preliminary list.

1. Experiencing a drop in its market share due to strong competition from large companies
2. Restricted Access (limited reach)
3. Unorganized UI
4. Inefficient Client management
5. Can enhance customer loyalty by ensuring their satisfaction
6. Focus on underinsured segments

Project Constraints. Project constraints are limitations, good or bad, that will or may constrain any solutions that I might propose. Constraints can be technical, monetary, time, or political. To date, I have identified the following preliminary list:

1. Time

2. Money

3. Scope

Preliminary Solutions and Ideas

Our project's approach is to eventually examine numerous alternative system solutions, and it would be premature to commit to any solution at this time. However, it is never too early to begin brainstorming and cataloging ideas.

- Centralized information administration

- Data privacy and security (encryption, access control)

- Customer awareness (Make them know what insurance is?)

Client's perceptions of what they want or expect. It is my understanding that you envision a new or improved systems that:

- Allows for ease of access to users.
- Allows for quick, efficient client management.
- Allows availability.
- Bring visibility

The analyst's perceptions of possible solutions and ideas.

Some of the proposed solutions and ideas are

- Collaboration
- Focusing on risk management

PROPOSAL

I propose to This section of the report outlines my proposal.

Project Schedule Overview

The following overall project approach and schedule is proposed.

Detailed Schedule for CRM Phase 1

1. Create entity relationship diagram for database (March 5th, 2023)
2. Create functional database (March 19th, 2023)
3. Create use cases and use case diagrams (April 2nd, 2023)

4. Create interface design mockups (April 9th, 2023)
5. Present CRM Phase 1 (April 16th, 2023)

The next phase of the project will be a detailed study and analysis of your current business system. The activities are depicted as follows:

Analyst History and Qualifications

- Cayden Lovett
    - ERD systems, C#, Python, MySQL
- Deja Hang
    - C#, Python, ERD systems, MySQL
- Kyle Lim
    - Python, MySQL, Java,
- Ajay Kasaudhan
    - C#, Python, MySQL, HTML, .NET
- Ryan Firl
    - C#, Python, ERD Systems, MySQL, Data Structures

Project Budget

This section of the report covers the estimated costs for this project. It should be emphasized that these figures represent mere estimates, estimates that are based on minimal background information. These estimates will continually be revised as the project progresses.

Currently there is no budget for this project, but I would suspect it to cost 1 million monopoly dollars. However, this may change as the project progresses as this is just an estimate. Once we have started to make headway on the project we will reevaluate where the budget is and make adjustments according to the most current projection.

Project Costs. The budget for this project will consider the following costs:

CONCLUSION

Overall, our project will update the current CRM system by implementing a preferred user interface that allows visibility of client data, ease of access with calendar integration, and an efficient client manager. Although there may be some problems with the development of the program, we have preliminary solutions and ideas for those problems. We have developed a detailed schedule, in order to stay consistent on the work and finish the project on time.