Interview questions

Background:

   We know it's a CRM -- Company Relations Management. Compiles data from a series of communication channels (telephone, social media, chat, etc) in order for companies to know about their relationships to stakeholders to serve the organisation's needs.
   This project will be a 'Personalised CRM' potentially geared towards the individual client.

Questions for client:
1. What's the goal for this system, for who to do what?
2. What are the problems that the software is expected to solve?
   a. "What are you going to use it for?"
   b. "In what way do you expect the CRM to help you?"
      i. Searchable list
         1. By company name
         2. Or by any field
         3. With any boolean combination function?
      ii. Tagging system (find all <sales> contacts, find all <managers>)
      iii. Summary box
3. What data do you have (eg. customer information)?
   a. How many customers will it manage
      i. Unknown, unbounded
   b. Will it be used to manage groups of customers or only one at a time
   c. Will it be used to manage customers from different organizations (discretion required?)
   d. How should the customer data be imported(import method)
      i. Some tabular format
      ii. Name
      iii. Job
      iv. Email
      v. Phone number
      vi. Company name
      vii. Variable fields

Key	Value
Name	ABC
Email	a@b.c
+	Add more information...

4. What functions would you like CRM to have regarding the data collected?
   a. What is the data that is expected to be automated?
      i. Campaigning features (e.g CRM in Sales department)
5. What do you normally do to extract useful information from the data you have?

6. Which platform do you want the software to be on?
   a. Does it need to run offline
      i. [Progressive web application - Wikipedia](#)
   b. Hosting location

Roles and who does what?
- Walter -- minute taker :: share minutes with the client after
- Richard -- team speaker :: MC

Greet and introduction.
Start with what we know of the project, what we know of a CRM. Are we anywhere close?
Thank the client for their time, keep it professional.

Talk to client, make user stories, motivational model, and / or LoFI mock-up, bring back to client for feedback