**Use case ID**  | **UC005:** Update customer profiles

**User Story |** Calls, as a relationship manager (RM), I want to be able to Update customer profiles, so that I can understand the pattern of their purchases for future marketing and/or outbound

**Goal |**Update existing customer profiles

**Priority |** H

**Actors |** Primary Actor – Relationship Manager Secondary Actor – Customer

**Pre-conditions |** The relationship manager has access to the Call Management Information System. The customer has an inquiry about holiday packages.

**Pos-conditions |** The relationship manager has successfully updated or created a profile of the potential/existing customer into the database via the Call Management Information System.

**Trigger |** Relationship manager contacts customer

**Main Flow |** The database generates a phone number of a new/potential client according to a “customer target list” for the RM to contact<br>The Call Management Information System retrieves customers details from a database<bar>Call Management Information System displays the details and provides the RM with guidelines and a script to help in providing an improved service to the end-customer<br>RM calls the potential client<br>Potential picks up the phone call and agrees to terms and conditions of the call, for example, client data may be collected to create a profile<br>RM collects data and starts to update the profile for the client<br>RM’s screen displays relevant holiday packages suitable for the potential client<br>Client decides to not proceed with purchasing the holiday package and ends the call<br>RM finalise the data collected<br>RM gives a score from 1-10 based on the likelihood to purchase the product<br>**UC006: Update Customer Score<br>**The Call Management Information System successfully saves the updated profile for the client<br>The Call Management Information System successfully saves the outcome of the sale by RM if the sale was made<br>**UC008: Update RM Score<br>**the use case ends

**Exceptions |** Exception1. Step -1 If the Call Management Information System is not available and the system is down.  
Exception2. Steps 1-13 – client ends the call at any time, and then the Call Management Information System blocks the RM from editing in the database and logs the activity.

Exception2. Steps 1-12 - client does not consent his/her information to be collected. RM must end the call and not proceed, then the Call Management Information System blocks the RM from editing in the database and log the activity.

Exception3. Step 9 – database does not respond.

**Includes/Extends/Inherits |** Includes **“UC004: Wrap-up Call” Includes “UC008: Update RM Score”**

**Supporting Information** | The experience rating is stored in the CMC system and used to determine the relationships manager’s score.

**Non-functional Requirement |** Performance: Reception for phone call

Security: The conversation isn’t recorded; data of the client will be recorded but client must accept this condition to go forward

Alternate Flow 1 | “Client is not Interested in the Service the RM is advertising<br>Client advises the RM that they are not interested<br>RM ends the call<br>Re-join at Step 12 in the Main Flow.

**Post-conditions |** The Call Management Information System successfully saves the scores given and recorded in RM’s profile.

**Exceptions |** Exception 1. Steps 1– client closes the phone call window anytime, and then th<br>Call Management Information System blocks the transaction at that point in time and logs the activity.