

## 1. CRM Integration:

**Current Status:** RJ is now actively integrating the insurance-survey and quote.pbibins website into the new CRM system.

**Goal:** To enable quick identification and synchronization of leads into the CRM.

### Next Steps:

- Once the integration is complete, RJ will be assigned to develop the **Customer Portal**.
- RJ responsibilities will include designing the portal and setting up the front-end structure.
- Maechael will subsequently point the necessary data to the Customer Portal for streamlined functionality.

## Website Revamp Strategy:

**Objective:** To revamp the website to correct existing errors, improve mobile-friendliness, and enhance overall SEO functionality.

### Action Items:

- Fix all meta tags, descriptions, titles, and alt texts.
- Ensure the website is fully optimized for both desktop and mobile users.

### Domain Strategy:

- Shift the main website to the pbibinc.com domain instead of pbibins.com
- This change aligns with our existing email domain (pbibinc.com) and our brand alias (pbibinc), which is already reflected in our logo.

## 2. Next Phase: Website Revamping:

- We will soon begin the comprehensive revamping of our website.
- This phase will focus on aligning all elements with our brand identity, enhancing functionality, and improving overall usability.

### Action Items and Next Steps:

- RJ will complete the CRM integration and move on to designing the Customer Portal.
- Maechael will prepare for data integration into the new Customer Portal once the front-end structure is ready.
- The team will initiate the website revamping project as per the outlined strategy.