**Strategic Brief**

**Mission Statement**

* The purpose of the database for Rainier Benefits is to manage current and prospective customers, benefit plans, services, and agent activities.

**Mission Objectives and Data Processes**

1. How does an agent see a contact’s information and view a log of all previous interactions with them?
   1. Agent will be able to open a view that shows all the contact information and all previous communications.
2. How does an agent see their scheduled follow-ups?
   1. The agent will be able to open a view that has a master list of all their scheduled follow-ups in descending order.
3. How does an agent see their total commissions?
   1. The agent will be able to open a view that totals up their commissions from the policies table.
4. How does an agent know whom to contact at a specific insurance carrier?
   1. The agent will be able to open a view that allows them to see all contact information for a carrier.

**Data Model: Subjects and Characteristics**

* Subjects
  + Contacts
  + Agents
  + Communications
  + Policies
  + Carriers
* Characteristics
  + Contacts
    - ContactID (PK)
    - Title
    - FirstName
    - LastName
    - BusinessName
    - NumEmployees
    - Type
    - Street
    - City
    - State
    - Zip
    - BusPhone
    - HomePhone
    - CellPhone
    - Fax
    - Email
    - Source
    - Website
    - Status
    - Notes
    - AgentID (FK)
  + Agents
    - AgentID (PK)
    - FirstName
    - LastName
    - Street
    - City
    - State
    - Zip
    - BusPhone
    - CellPhone
    - Email
    - LicenseType1
    - Type1Expiration
    - LicenseType2
    - Type2Expiration
    - HireDate
    - TerminationDate
  + Communications
    - ComID (PK)
    - Type
    - Outcome
    - Date
    - Time
    - FollowUp
    - AgentID (FK)
    - ContactID (FK)
  + Policies
    - PolicyID (PK)
    - PolicyNumber
    - Carrier
    - Subscribers
    - Type
    - MonthlyCommission
    - ContactID (FK)
    - CarrierID (FK)
  + Carriers
    - CarrierID (PK)
    - Name
    - Street
    - City
    - State
    - Zip
    - Representative
    - BusPhone
    - CellPhone
    - Email