**Project Charter**

**For**

***Customer Relationship Management (CRM) Phase 1 - CRM Foundation; Field Marketing***

**By**

***Devon McKinney, Emmanuella Shokare, Kole Peterson, Torsten Marsh and Viacheslav Sotov***

**PURPOSE**

This *Project Charter* presents the preliminary findings of my investigation into the feasibility of your project to ***build a foundation for the Customer Relationship Management (CRM) system for managers of Federated Insurance***. **Develop a customer record that implements Suspects, Prospects, Insureds, and member lists.** **Give each Marketing Representative their own schedule through outlook on the CRM system, by integrating between CRM and Outlook. All while minimizing the impact of the Federated Insurance distribution system. This project will also help to replace old technologies that were previously used which will then help to maintain the customer data as well as improve relationship between the Marketing Representatives and the customers.** This report also outlines my proposal of 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.**Implementing a CRM system would increase the following for Federated based on analysis.**

* ***Increase in Sales***
* ***Following up Sales Opportunities Systematically and on Time***
* ***Increase in Customer Service***
* ***Build relationship between Marketing Representatives and customers***
* ***Increase in Ability to Share and Distribute Data***
* ***Marketing Product and Services More effectively and effiently***
* ***Improve Customer Satisfaction and Retention***

**Project Description**

This section of the report describes the history that led to this project and the proposed project scope.

**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:

The project will address the following business functions:

1. <**Customer Record – Provide a foundation for notes on the customers such as their rank, meeting times, status (Win, Lose, Not proposed)** >

2. <**Scheduling – Integrate the CRM System with outlook so that MRs don’t have to spend time setting their schedule for the week by giving them reminders and goals about upcoming meetings and the status of those that they are going to meet with**>

3. <**Allow use of queries – EX: Number of normal insureds and the correlation of life insurance**>

**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. ***<Nick Wilson>***

***<Business Technology Manager, Information Services>***

b. ***<Bailey Thurmes>***

***<Systems Developer I , Information Services>***

2. Non-Management - Direct Users of the System

a. ***<Dr Rajeev Bukralia>***

***<Professor>***

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

a. ***<Federated Insurance>***

***<title>***

**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. **<When a marketing rep leaves figure out a way to solve the issue of another rep filling in for the rep thats leaving>**
2. **<Duplicates of messages need to be taken care of so distrubution system doesn't get affected>**
3. **<Typos can disrupt distribution system, implement clear training for users of the system, additional training for users who are not tech friendly with new software >**

**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. <**If someone in the CRM System leaves it could leave an empty space in the CRM and could create problems**>

2. <**Internet Connectivity issues could cause CRM system to glitch and not be able to restore itself**>

3. <**CRM System** **could be difficult for MRs to understand and make their job more complicated rather than easier**>

4. <**Doesn’t keep all prospects together, if the volume of customers gets too high it could throw the CRM system off**>

**Preliminary Solutions and Ideas**

My project approach will 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.

**Client's perceptions of what they want or expect.** It is my understanding that you envision a new or improved systems that: **As a client seeking insurance, they are looking for a rep/company who does the following:**

* **Provides trust to the clients**
* **Provide confidence they will insure you**
* **Provides quick and reliable responses to clients**
* **Offer different choices or plans of insurance**
* **An insurance company that will “go to bat for me” when necessary**

**The analyst’s perceptions of possible solutions and ideas**.

**PROPOSAL**

We propose to implement a CRM System for Federated Insurance’s Field Marketing management. This section of the report outlines my proposal.

**Project Schedule Overview**

The following overall project approach and schedule is proposed.

**Detailed Schedule for *<Phase 1>***

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

|  |  |
| --- | --- |
| **Item** | **Deadline** |
| Refine Project Charter | 02/12/2023 |
| Create WBS and Gantt Chart | 02/09/2023 |
| Create the ERD | 03/05/2023 |
| Functional Database | 03/19/2023 |
| Create the Cases and use Case Diagrams | 04/02/2023 |
| Interface Design | 04/09/2023 |
| Presentation | 04/16/2023 |
| Peer Review | 04/16/2023 |
| Slack and Scrum Notes | 04/16/2023 |

**Analyst History and Qualifications**

1. ***<Torsten Marsh>***

***<952-564-7269>***

***<Pursuing Bachelor’s degree in Computer Information Technology and Master’s degree in Data Science>***

1. ***<Kole Peterson>***

***<651-587-2700>***

***<Pursuing Bachelor’s degree in Computer Information Technology>***

1. ***Emmanuella Shokare***

***314-417-6104***

***Pursuing Bachelor’s degree in Computer Information Technology***

1. ***<Viacheslav Sotov>***

***<507-759-8144>***

***<Pursuing Bachelor’s degree in Computer Information Technology>***

1. ***<Devon McKinney>***

***<612-759-4890>***

***<Pursuing Bachelor’s degree in Computer Information and Technology>***

**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.

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

**CONCLUSION**

**Overall, we will improve the current CRM system of Federated and make it easier for marketing reps to do their job in a timely and orderly manner.**