Use Case

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| Name: | Federated Insurance CRM |
| Primary Business Actor: | Marketing Representative |
| Primary Systems Actor: | District Manager |
| Description: | The use case describes the use of the CRM system by the marketing representative and the district manager. It enables the marketing representative to contact customers who had registered for an informed section and create personalized follow-up systems. The district manager would be able to use the CRM to oversee the process of the marketing representatives. |
| Action: Customer Sign-up | 1. Customer registers and log in 2. Customer can fill out whitepaper and uploads 3. The CRM notifies the Marketing representative 4. The CRM sends and email invite to customer 5. Customer accepts invite 6. Marketing Representative creates the meeting 7. Marketing representative sends follow up email |