CRM v1.0	
Project Plan Updated	6/14/2021
Target Completion Date:	11/30/2021
Owner:	Mike Caturegli
Support Personnel (Approved Signers)	• Vani Ganti (Project Manager) • Ben McKay • Jo Ann Del Gatto • Jody Black • Glenn Leung • Joy Erven • David Kodama
Scope:	See Attached Requirements in Appendix A.
Significant Vendors:	• Salesforce • Damage Point (Professional Services in Texas – SF required)
Budget:	$250,000 (proposed year 1, v1.0, not yet approved as of 8.31.20)
What Line Item Will Project Budget Come From:	Capital Expense
Benchmark:	Successful implementation and in production use of high priority features of the CRM software product, including key integration points. High priority functionality only.

Benchmark	**Dependency**	**Status**	**Start**	**Finish**
Project Sheet Approved	CEO Review	Completed		
Comments:				

Benchmark	Dependency	Status	Start	Finish
Kick-Off Meeting		Pending	6/22/2021	
Comments:				

Benchmark	**Dependency**	**Status**	**Start**	**Finish**
Comments:				

Benchmark	**Dependency**	**Status**	**Start**	**Finish**
Project Completion			11/30/2021	11/30/2021
Comments: Expected to complete in 4 months from Kick Off Meeting. Various Benchmarks TBD after kickoff.				

Benchmark	**Dependency**	**Status**	**Start**	**Finish**
Comments:				

Budget Ledger Summary:

FY	Description	Amount	Budget	Remain
2021				
2021				
2021				
2021				

Manager Approvals:

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<IF OVER BUDGET BY 10% and $50K, CEO APPROVAL REQUIRED>

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2021 Budget Ledger Detail:

FY	Date	Description	Category	Amount	Total Spend	

APPENDIX A - PRELIMINARY SCOPE/REQUIREMENTS – 08/31/2020

I. High Level Scope and Objectives

- **Goal**: To enable the SLA to provide world class customer service to its members and constituents ("customers").
- **Objectives**:
  - Create an org structure that streamlines processes for interacting with our customers.
  - Create efficient processes to interacting and assisting our customers.
  - Implement tools that provide SLA staff with customer-related data that assists them in achieving the Goal.

II. Functionality:

- Customer Dossier: Ability to aggregate various data elements from different systems onto one, "Customer Profile" window. High level summary with ability to drill down to details screens or launch source system.
- Ability to identify a customer when they contact the SLA based on phone number or email address
- Display Member participation on SLA Board and Committees, tenure, positions (from Board Effect)
- Connect to phone system, phone system launch? MiTel/ShoreTel + Chat feature. Would like to consider replacing existing phone system.
- Display Drill Down Windows:
  - Member contact logs (calls, emails, filing questions, who they talked to, when, why, etc.)
  - Member attendance logs: seminars, annual meeting, other events (RAPID)
  - Member affiliations to other associations (WSIA, CIWA, etc.). CRM is the source for this.
  - Member social media enrollments. If possible, LinkedIn info, FB, IG, etc.
  - Member relationships to other members and co-workers (social networking)
  - Member employment history, companies, tenure, etc. (very important). CRM is the source.
  - Member brokerage annual California Transactions and premium
  - Member rolling 12 months brokerage ranking (premium and volume ranks)
  - Member participation in Grass Roots program. If yes, home address or at least city of residence for the member, how long a grass roots member, other related info.
  - Member brokerage' primary Lines of Business (LOB's). Primary NAICS of their insureds (top 10?).
  - Member education level, schools, etc.
  - Member use of SLA products and services (SLIP, Learning Center, Emerging Risks…)

- Member category (licensed broker, market, works for brokerage, compliance, filer, regulator, lawyer, industry professional/expert…)
- Consider replacing Constant Contact for email campaigns, if CRM has similar capabilities, otherwise see "integration points" below)

III. <u>Integration Points/Data Feeds (Customer/Individual Level):</u>

- RAPID (Core Enterprise System) Data Elements
- Check if customer is in our RAPID system. If yes, load applicable name, company/brokerage name, number, license number, license status, addresses, phone numbers, email addresses.
- Check if customer is in our SLIP system (policy filing portal). If yes, load applicable name, company/brokerage name, number, license number, license status, addresses, phone numbers, email addresses.
- Load transactional metrics: Total transactions in the last 12 months, total premium in the last 12 months.
- SLIP Use Metrics
    - Are they a SLIP portal user?
    - Collect and display metrics for how they use SLIP, role, frequency, etc.
- SLACAL.org Website
    - Member Metrics/Neustar visitor data, affinity scores, etc.
- Learning center content
    - Metrics on CE videos, seminars, credits, licensing, etc.
    - Metrics on Emerging Risks Bulletin Board contributions, visits
    - Link to other educational videos for wholesalers
    - Link to other retailer targeted education
    - Links to other videos and resources?
- Learning Center Functionality (replace, supplement existing)?
    - Event registration, modification, and cancellation
    - Auto nametag generator
    - Electronic event attendance tracker (CE attendance, other attendees)
    - Event scheduling
- Constant Contact Metrics on email campaigns, open/read stats, or replace entirely
- Board Member demographics from Board Effect portal
- JIRA ticketing system summary list of tickets from the customer
- Grass Roots program participation

User Breakdown:

- Internal:
  - About 50 full-time “CSR” types
  - About 30 additional end users with part-time/infrequent CSR type usage, including executive/management use
- External
  - About 10,000 total contacts
  - About 2,000 unique external users who may call or log tickets

Additional Data Elements (ongoing list):

- SLIP – filer name, filer user id, filer role (master user, subordinate user), brokerage, broker Id, submission methods, volume, tag numbers
- RAPID – Broker license info, broker brokerage, brokerage filing stats like volume and premium, etc. Defer to Jo Ann for other.
- Constant Contact (if applicable) – Broker email address, contact “category, list or tag”, open/read rates, number of times we’ve sent them an email blast.
- JIRA/IT ticketing system – number of and types of questions raised by the broker, responses, etc.
- SLA website – visits per month or year, what areas visited, include Learning Center and Emerging Risks usage