

**Questionnaire**

**Questionnaire: The questionnaire is broken in to two parts, one for each of the user types; Salesperson and Sales manager.**

**Salesperson**

**Besides from the regular requirements, are there any other things you would like the system to be able to do?** I think it would be a good idea for there to be a note section, where you can record ideas about specific calls or meetings that took place.

**Are there any other fields that are not industry specific that you believe should be included in the client profiles?** It would be a good idea to have an approximation of the clients net worth; if a salesperson has that information they might be able to upsell or cross sell other products if the JC Insurance Agency ever expands.

**Do you think there are any metrics that the system should not record about your behavior to send to your sales manager?** I think if the system was recording my response time or monitored my screen, i would consider that a breach of my privacy. I think the system should be used to help make me more productive and not as a way for my manager to watch my every move.

**Sales Manager**

**Besides from the regular requirements, are there any other things you would like the system to be able to do?** I would like the system to format the analytical reports in a professional manner, that way i can pass them directly along to my director, and that will save me time.

**Are there any specific metrics you think it would be productive to track on your salespeople?** It might be productive to be able to generate a report for how many sales calls and/or the amount of sales meetings the salespeople made each day, week, and month. Another interesting metric i would like to track is how many client profiles each salesperson added.