**CRM User Categories & Interaction Model**

**1. Core External Users (Customers)**

* **Customer (External)**
* Interaction: Submit Legal enquiries (via Website (Contact form) / AI assistant / Assisted entry by Reception).
* Touchpoints: Website, AI chatbot, contact form, surveys.
* Purpose: Core service consumers; their journey defines CRM intake → resolution → feedback.

**2. Core Service Delivery Users *(“Frontline Roles”)***

* **Reception Staff**
* Interaction: Log calls, redirect to website/AI, assisted record creation, metadata capture, escalation to Triage or dedicated specialist Adviser (Reasonable Adjustments).
* Purpose: Human interaction for customers who require reasonable adjustments, ensures inclusivity.
* **Triage Officers**
* Interaction: Intake queue, checklist workflow, signposting, allocation, escalation, draft responses.
* Purpose: First decision makers; resolve simple enquiries, escalate workload to Adviser pool.
* **Advisers**
* Interaction: Assigned cases, enquiry responses (written/voice), follow-up, escalation, review Triage draft responses before submission (QA).
* Purpose: Provide direct legal advice, manage cases.
* **Senior Advisers**
* Interaction: Handle complex enquiries, review escalations, Adviser QA.
* Purpose: Ensure higher-level advice quality, mentor advisers.
* **Senior Legal Managers**
* Interaction: Oversee legal Adviser teams, manage QA workflows, update policies.

AI Training Content(In Collaboration with Content Expert, Product manager, Operations Manager, AI Admin)

Curate structured content (FAQs, legal interpretations, standard responses) that feeds into AI/assistant models.

Tag and categorise content so AI can recognise context and serve the right responses.

* Purpose: Quality assurance, governance, and knowledge management.

**3. Service & Business Owners *(“Control & Oversight”)***

* **Product Manager**
* Interaction: Sets workflow rules, oversees triage/adviser allocation logic. Manages business rules, signposting lists, resource content.
* Purpose: Owns CRM configuration for service delivery consistency.
* **Operations Manager**
* Interaction: Ensure GDPR compliance, manage SAR requests, oversee data deletion/retention.

Signposting Resource Management: Update lists of external organisations, referral pathways, and links for out-of-scope enquiries.

Ensure triage officers always have current signposting resources at hand.

Policy & Legal Updates:Input updates from Senior Legal Managers into CRM knowledge base so triage/advisers always use current law and policies.

* Purpose: Operational governance, workload balance.

Compliance & risk management.

* **Service Owner/Change Delivery Manager**
* Interaction: Oversees CRM as a service, ensures it aligns with service strategy, consume dashboards and reports.
* Purpose: Accountable for CRM effectiveness in delivering direct advice.

**4. Data & Insights Roles *(“Data Consumers & Analysts”)***

* **Data Analyst**
* Interaction: Creates dashboards, MI reports, BI exports.
* Purpose: Operational insight, Trends & performance tracking.
* **Data Insights Manager**
* Interaction: Oversees data quality, runs surveys, manages analytics strategy.
* Purpose: Strategic data management, research, impact reporting.
* **Board of Directors**
* Interaction: Consume dashboards, reports, KPIs.
* Purpose: Strategic oversight, evidence-based decision-making.

**5. Technical & Admin Roles *(“System Owners”)***

* **CRM Admin / IT**
* Interaction: System configuration, updates, account management, audit logs.
* Purpose: Keep CRM stable, secure, and compliant.
* **AI System Admin**
* Interaction: Maintain AI models, review training data, refine triggers.
* Purpose: Ensure AI reliability and ethical use.

Compliance & risk management.

* **Content Expert**
* Interaction: The Content Expert isn’t a “core CRM user” like triage/advisers.  
  they are a supporting / enabling CRM role, ensuring the knowledge layer of CRM (checklists, templates, signposting) stays aligned with website content and feeds AI. The Content Expert’s primary system of record is usually the website CMS (Torch box), not the CRM, but they do become a CRM user role in the To-Be model:
* Knowledge Base Updates: The AI assistant pulls knowledge not only from the Lease website but also from internal CRM-managed FAQs and responses.

Content Experts maintain both sides, so CRM knowledge stays aligned with website messaging.

* Create, edit, and maintain website knowledge articles (FAQs, triage checklists).
* Ensure content aligns with “Lease Style” and regulatory requirements.
* AI Training Content(In Collaboration with Senior Legal Manager, Product manager, Operations Manager, AI Admin)
* Curate structured content (FAQs, legal interpretations, standard responses) that feeds into AI/assistant models.
* Tag and categorise content so AI can recognise context and serve the right responses.
* Content Performance Review
* Monitor feedback loops from advisers and triage (e.g., “content was unclear” or “not useful”).