

Estimate Story Point

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I need a system that will quickly inform me of my clients expectations when buying insurance.

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As a potential client I want to be able to quickly comparison shop the rates for different insurers based on my information

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I need a system that can offers me the most valuable insurance plan available and switch from my current insurance plan.

I need an intuitive, responsive interface which will return quotes and connect me to the proper agent.

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I need to be able to view the log of the conversations between my agents and our potential and current clients.

I need a system that gives me the very important information or notice in the simplest way to understand.

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I need to have close to real-time metrics about the agency, regarding client retention, client retention per agent and other relevant data.

I need a system that can generate quick estimates before I start working with clients

I need a system that can inform me of my clients past insurance info quickly, so I can give accurate quotes

13

I need an interface which can easily be accessed by phone, web or mobile.

I need to be able to view and update my profile, my insured properties, as well as view my payments and payment methods.

I need a system that I can view the history of my insurance and analyze by itself. And gives me a feedback.

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As a potential client, after generating a quote online, I want to be able to quickly (as few clicks as possible and no redundant information entered) be connected with an agent, and setup with an insurance policy that matches this quote as closely as possible

I need to have full access to the system, being able to manage the agents' and customers' accounts.

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As a potential client, I want to be able to access the site, and have the option create an account so I can store my information for quicker comparison shopping in the future