



Capstone Project Requirements Meeting Questions

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General Requirements

- What are the primary business goals for this project?

A: Small insurance company focused on customer satisfaction with limited technology. Old database but phone and mail driven. Need a modernized system.

- What online services would you like your customers to access?

A: customer facing website. Customers need to be able to quote a policy online, existing customers must be able to view existing policies and contact representatives

- Are there any industry-specific compliance regulations (e.g., privacy laws, insurance regulations) that the platform must adhere to?

A: 15000 customers over half a dozen reps. Split reps by region but view any information on any customer's policy. Policy will provide quote that holds price for 30 days, accepted policies are in force for 1 year unless contacted by customer.

- Should the system provide an option for customers to compare different policies or coverage options?

A: Policies can be added or cancelled for existing customers. 2 liability limits for home and auto insurance along with deductible.

- What is the budget for this project? Is it flexible?

A: 250,000\$, flexible based on solution quality.

- What is the timeline for implementation?

A: Mid way through April.

- Are there any accessibility standards the platform should provide?

A: Fully accessible, light and dark mode, visual aids for visual impairment.

- Should the system allow customers to request changes to their quotes or policies after submission?

A: Quotes are available. Contact service rep for special ratings.

- How would you like the system to handle changes to existing policies?

A: Existing policies can be cancelled and will quote after full life of policy based on if claims were made.

- Do you envision a fully self-service portal or an interface that still requires customer-agent interaction?

A: Customer agent interaction

- Will customers need the ability to update personal information and preferences through the online portal?

A: Profiles can be updated via portal.

- How would you like customers to interact with support online? Should there be a live chat option, email support, or call scheduling?

A: 2 forms to contact service rep. Via phone or email.

- Should the system allow the customer to cover multiple people (family, and/or friends)

A: Yes but 1 main policy holder

- How would you like the renewal process to work? Should it be a seamless transaction, or would you prefer that agents intervene?

A: Auto requotes

- What is the anticipated user load?

A: 15000 - 20000 scalable

- Will this system authenticate customers through a login/sign up screen? Will these account details be stored in a hosted DB?

A: Simple login screens with password and email. Password might be able to be reset.

- Are you looking for automated support features such as FAQs or chatbots?

A: Chatbot not necessary.

- What levels of security will the software require? Ex. Captcha, Passwords, Policy Numbers, Usernames, Email Verification

A: Just email and password

- Would you like automated reminders sent to customers about upcoming renewals?

A: Email alerts

Mobile System Requirements

- What are the key features you want in the mobile app (e.g., viewing policy details, submitting claims, renewal reminders)?

A:

- Should customers be able to customize notification preferences (e.g., frequency, types of notifications)?

A:

- Would you like customers to be able to submit claims directly through the app, including uploading images and documents?

A: Images and documents not collected online. May be collected for high value claims.

- Are there any specific privacy concerns that should be addressed for app users?

A: Personal info must be protected at all times, via secure login

- Would you like the app to have geolocation features (e.g., to find nearby agents or claim locations)?

A:

- What types of push notifications would you like customers to receive (e.g., policy renewals, claim status updates, urgent alerts)?

A:

- How would you like to handle secure login and authentication for the mobile app? (e.g., biometrics, password, or multi-factor authentication)

A:

System Requirements

- Will our product need to operate as a mobile application, PC application, or both?

A: Mobile friendly website

- Will there be a dino run game if the customer loses their connection?

A: Not needed

- Will the system be focused more on data analysis and manipulation, or visualization of the company's data trends?

A: NA

- What languages and frameworks will the product utilise?

A: Front end: flexible (js, java)
Middle tier: java

- If a PC application is required, will a web application or executable desktop application be more beneficial for the company?

A: web application.

- Does the new system need to integrate with existing tools or services?

A: Just the internet.

- Will there be a company database provided or will we need to create our own?

A: New database (sql).

- How should the system handle emergency scenarios (Server issues, data leaks, etc)?

A: Internal team will handle