1. INTRODUCTION (Title & Background) [12 marks]

a. Is the title clear and concise?

Yes, the title "Development of an Online Insurance Management System for Efficient Operations and Enhanced Customer Experience" is both clear and concise. It directly addresses the objective of the project, highlighting the development of an online system and its focus on improving efficiency and customer experience.

b. Is the current system explained?

Yes, the current system is explained thoroughly. It is an on-site system running on physical servers and accessible only from the office, restricting users' access. Its reliance on Windows OS further limits its accessibility on other platforms such as macOS, Linux, and mobile operating systems like Android.

c. Are the advantages and disadvantages of the current system mentioned?

Yes, the document highlights the key disadvantages of the current system, such as accessibility limitations, reliance on physical presence, and inefficiencies caused by load-shedding. The advantage of the current system—its ability to handle daily insurance tasks—is implicit but not a focus due to the severe limitations.

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2. PROBLEM STATEMENT & PROPOSED SOLUTION [12 marks]

a. Are the problems being experienced with the current system explained?

Yes, the problems are clearly outlined. The system is only accessible in-office, lacks platform flexibility, fails to support remote work, and cannot handle queries outside business hours. Furthermore, physical server issues like load-shedding make it unreliable.

b. Are all the tasks in the solution explained?

Yes, the tasks to be implemented in the online system are thoroughly detailed, from claims processing, policyholder self-service, premium adjustments, and stakeholder report generation to the role of agents and IT administrators.

c. Are the expected outcomes of the project mentioned?

Yes, the outcomes include increased accessibility for all users, streamlined operations, more efficient claim processing, and enhanced customer satisfaction due to 24/7 system availability.

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3. AIMS & OBJECTIVES [12 marks]

a. Is the aim clear and unambiguous?

Yes, the aim is clear: to develop an online insurance management system that simplifies operations and enhances customer experience by allowing remote access, self-service functionality, and seamless integration of various processes.

b. Are the objectives SMART (Specific, Measurable, Achievable, Realistic, and Time-bound)?

Yes, the objectives are SMART:

- **Specific**: Create an online platform for policyholders, agents, administrators, and stakeholders.

- **Measurable**: Success will be measured by increased system access, customer satisfaction, and operational efficiency.

- **Achievable**: The project leverages Next.js, a proven technology, and focuses on attainable goals like enhancing security and usability.

- **Realistic**: The project's scope aligns with current technological capabilities, and the company has the capacity to implement it.

- **Time-bound**: The project has a clear timeline outlined in the Gantt chart, with specific deadlines for each phase.

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4. JUSTIFICATION, SCOPE & ETHICAL CONSIDERATION [12 marks]

a. Are there any identified benefits of doing the project?

Yes, the document identifies multiple benefits, including enhanced accessibility, 24/7

availability, improved operational efficiency, customer satisfaction, and the ability to handle queries and claims remotely.

b. What will happen if the project is carried out?

If the project is carried out, Heritage Life Limited will experience streamlined operations, improved customer interaction, and greater flexibility for agents and stakeholders. Load-shedding and physical access issues will be mitigated.

c. What will happen if the project is not carried out?

If the project is not carried out, the company will continue to experience operational inefficiencies, customer dissatisfaction, limited access, and downtime due to reliance on physical servers.

d. Is there any time frame for doing the project?

Yes, the time frame is clearly outlined in the Gantt chart, covering requirements gathering, system design, development, testing, and deployment over a period of 14 weeks.

e. Does the research ensure confidentiality of research participants?

Yes, the proposal emphasizes strict adherence to data protection laws and ethical guidelines, ensuring that users' data is secure, used transparently, and stored in a way that ensures privacy.

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5. INNOVATION/NOVELTY [15 marks]

a. Any new ideas generated/implemented?

Yes, the innovation lies in transitioning from an on-site system to a fully online, cloud-based system with multi-platform accessibility. The self-service portal is a novel improvement that empowers customers to manage their own policies without needing administrative assistance.

b. Can the project be industrialized?

Yes, the project has the potential to be scaled and adopted by other insurance companies facing similar challenges, especially in developing countries where accessibility and platform flexibility are issues.

6. PROJECT COST/BUDGET & PROJECT PLAN [12 marks]

a. Is the project budget clear?

Yes, the budget is clearly presented, with categories for development, compliance, maintenance, training, and contingency.

b. What are the direct costs?

Direct costs include hosting services, domain acquisition, and the internet connection required for system deployment and maintenance.

c. What are the indirect costs?

Indirect costs include training for staff to use the new system, ongoing maintenance, and compliance with data protection laws.

d. Are the project tasks well planned?

Yes, the tasks are well structured in the Gantt chart, with distinct phases for requirements gathering, system design, development, testing, and deployment, all within a realistic timeframe.

7. PROPOSAL DOCUMENT & REFERENCES [15 marks]

a. Is the document written according to the required specifications?

Yes, the document is organized into clear sections that address the project's background, problem statement, objectives, justification, and ethical considerations.

b. Are the references relevant and current?

Yes, the references include current sources, such as Web Development Magazine (2022) and Belite, B. (2023), supporting the technology choices and methodologies used in the proposal.

8. PRESENTATION SKILLS [5 marks]

a. Does the presentation show key information, right content, and material?

Yes, the proposal presents all key information, including a well-structured solution, clear objectives, and a detailed plan.

b. Is the presentation logical and well-planned?

Yes, the presentation follows a logical flow, beginning with context and background, followed by the problem statement, solution, and a clear project plan.

c. Is the presenter able to articulate facts and issues?

Yes, the facts and issues are articulated clearly in the written proposal, with sufficient detail to support the project's feasibility and importance.

In conclusion, this proposal for the development of an online insurance management system is comprehensive, well-structured, and addresses all the key evaluation areas typically considered in project assessments.