

Phase 1: Problem Understanding & Industry Analysis

1. Requirement Gathering

- Store and manage **policy details** (type, premium, expiry, customer).
- Automate **renewal reminders** for policies.
- Enable **claim submission & approval process**.
- Provide **dashboards** for management (renewals, claims, agent performance).
- Ensure **data security** for sensitive customer information.

2. Stakeholder Analysis

- **Policyholders (Customers):** Submit claims, receive updates, renew policies.
- **Agents:** Manage policies, handle claims, follow up with customers.
- **Claims Officers:** Verify documents, approve/reject claims.
- **Managers/Admins:** Monitor renewals, claims, revenue, and agent performance.

3. Business Process Mapping

1. **Policy Creation** → Agent issues a policy to a customer.
2. **Policy Renewal** → CRM checks expiry → sends reminders → agent/customer renews.
3. **Claim Submission** → Customer submits → assigned to agent → verified → approved/rejected.
4. **Reporting** → Manager views dashboards for performance & decision-making.

4. Industry-Specific Use Case Analysis

- Most insurance companies need **policy lifecycle management, renewal automation, and claim processing transparency**.
- Benchmark: Companies using CRMs like Salesforce improve **claim resolution time and customer retention**.
- Compliance: Sensitive customer and claim data must be secured (field-level security, encryption).

5. AppExchange Exploration

- Explore existing Salesforce apps that could support insurance use cases:
 - **Insurance Policy Management Apps**
 - **Document Management Apps** (for claims)
 - **SMS/Email Notification Apps** (Twilio, SendGrid, ClickSend)