

Case Study Submission – Lightbulb Inc.

1. What elicitation and prioritization techniques would you use given the set target launch?

I would use a combination of stakeholder interviews and observation to understand the current manual process. To prioritize requirements, the MoSCoW technique will help us focus on features needed by the 1 April 2024 deadline, such as quote comparison generation and online customer viewing

Elicitation Techniques I would use:

- Stakeholder Interviews: one-to-one sessions to gather detailed insights from stakeholders
- Workshops: To collaboratively brainstorm features and user flows.
- Observation: Watching how advisors use the current Excel-based system.
- Document Analysis: Reviewing Excel sheets, reminder templates, and current booking exports..

Prioritization Techniques:

- **MoSCoW Method** (MUST have, SHOULD have, COULD have, and WON'T have):

Stakeholders can evaluate requirements collaboratively using this technique.

MUST have(Mandatory)

SHOULD have (Of high priority)

COULD have (Preferred but not necessary)

Won't have(Can be postponed and suggested for future execution).

We can use the MoSCoW method to align features with the April 1, 2024, target.

- **Value vs. Complexity Matrix:** To ensure high-value, low-effort features are implemented first.
- **Kano Model** – to identify features that delight users versus those expected by default.

2. List any open questions you would have for the stakeholder.

- Will the proposed system connect directly with insurer portals, or will it rely on manual data uploads for quote retrieval?
- What booking system is used to export the renewal allocation sheet?
- Are there stable and documented APIs available from insurance partners to enable real-time quote integration?
- Which devices and platforms should the customer portal be optimized for (e.g., mobile, tablet, desktop)?
- Should customers have the ability to initiate purchases or request policy modifications through the portal?
- What type of user authentication will be required to ensure secure access to customer-specific quote information (e.g., OTP, login credentials)?
- Is the system expected to generate and dispatch automated renewal reminders? If so, are standardized messaging templates already in place?
- What specific performance metrics or reports should the system support (e.g., advisor efficiency, quote conversion, renewal retention)?
- Are there any regulatory or internal security guidelines the system must follow when storing and presenting insurance quote data?

3. Create a flow chart demonstrating the existing motor renewals workflow (as-is) based on the information provided and propose a new workflow (to-be).

- **AS-IS:** Manual process involving Excel, PDF generation, and third-party email tool
- **TO-BE:** Automated quote fetching, rule-based allocation, online quote viewing, reminder scheduling

As-Is Workflow (Manual Process) **To-Be Workflow (Proposed Automated Process):**

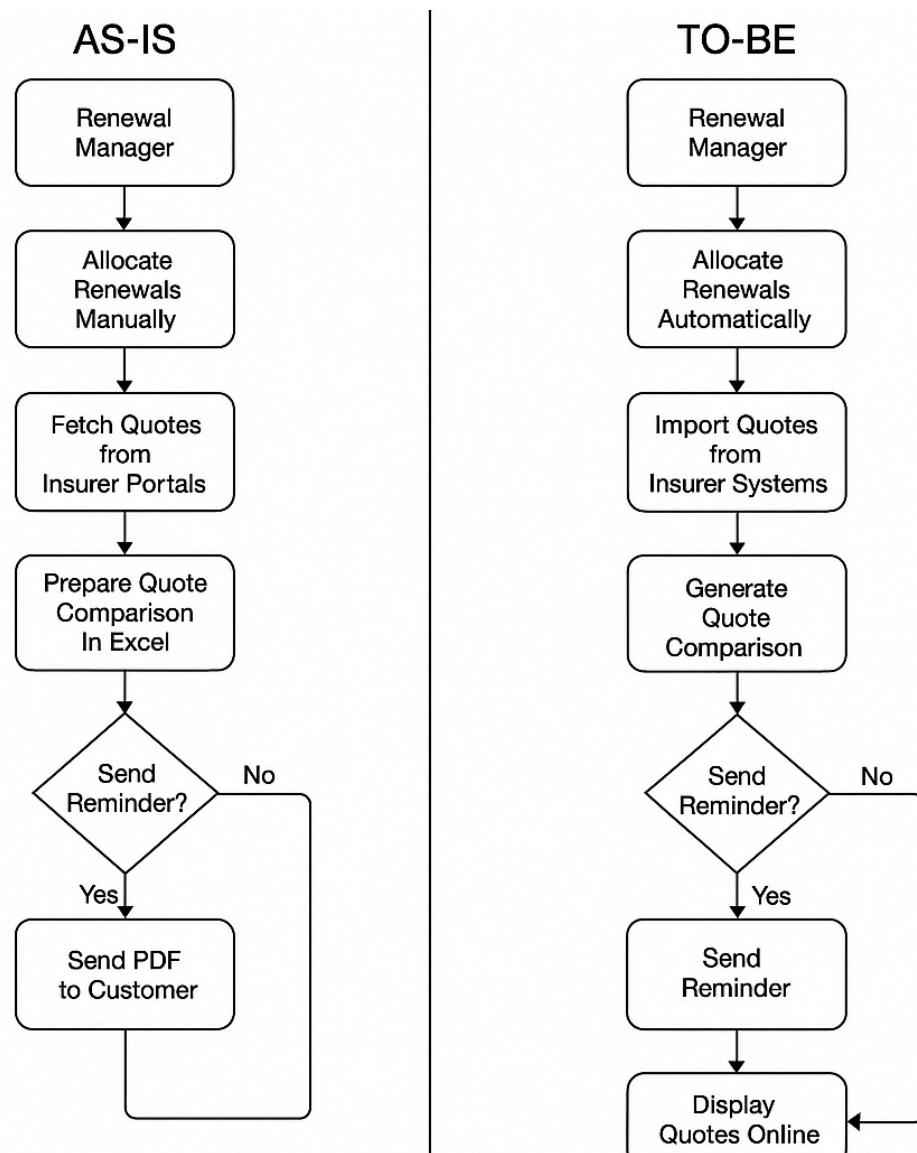


Figure1 : AS-IS/TO-BE workflow

4. Create FRS and/or user stories.

Key Functional Requirements:

- FR1: The system shall allow advisors to log in and view assigned renewals.
- FR2: The system shall allow importing or integrating quotes from 10 insurers.
- FR3: The system shall generate online quote comparisons in real time.
- FR4: The system shall automatically generate and email secure links to customers for accessing their renewal quotes.
- FR5: The system shall auto-schedule and send renewal reminders 60 days prior.
- FR6: The customer portal shall display quotes securely via a unique link.

Sample User Stories:

- As an advisor, I want to receive pre-assigned policies so I can focus on closing renewals efficiently.
- As a system, I want to auto-fetch insurer quotes to eliminate manual entry.
- As a customer, I want to view and compare my renewal quotes online so I can decide easily.
- As a renewal manager, I want reports on advisor performance and customer retention.

5. Create diagrams, flow charts or wireframes to support the solution

Provided a **Use Case Diagram** showing the interactions between the renewal manager, customer, advisor, and system.

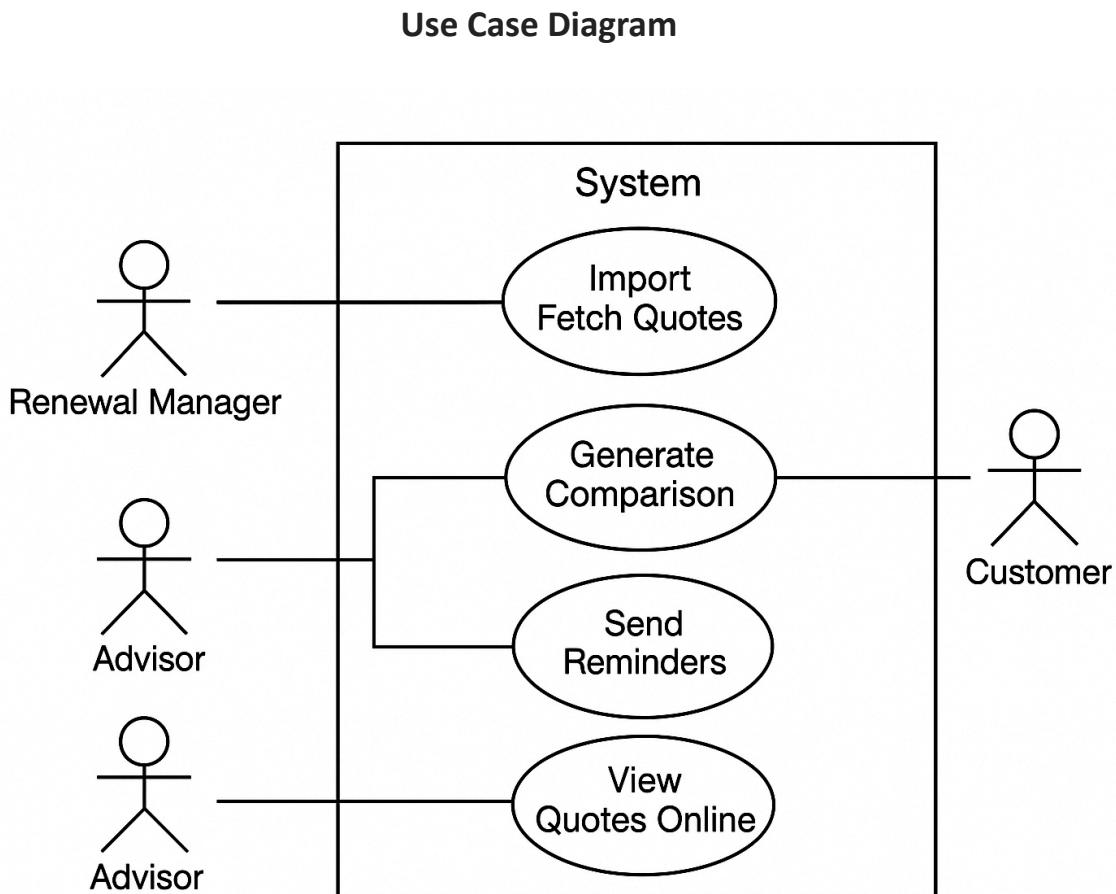


Figure2 : Use Case Diagram

Below is the sample Wireframe

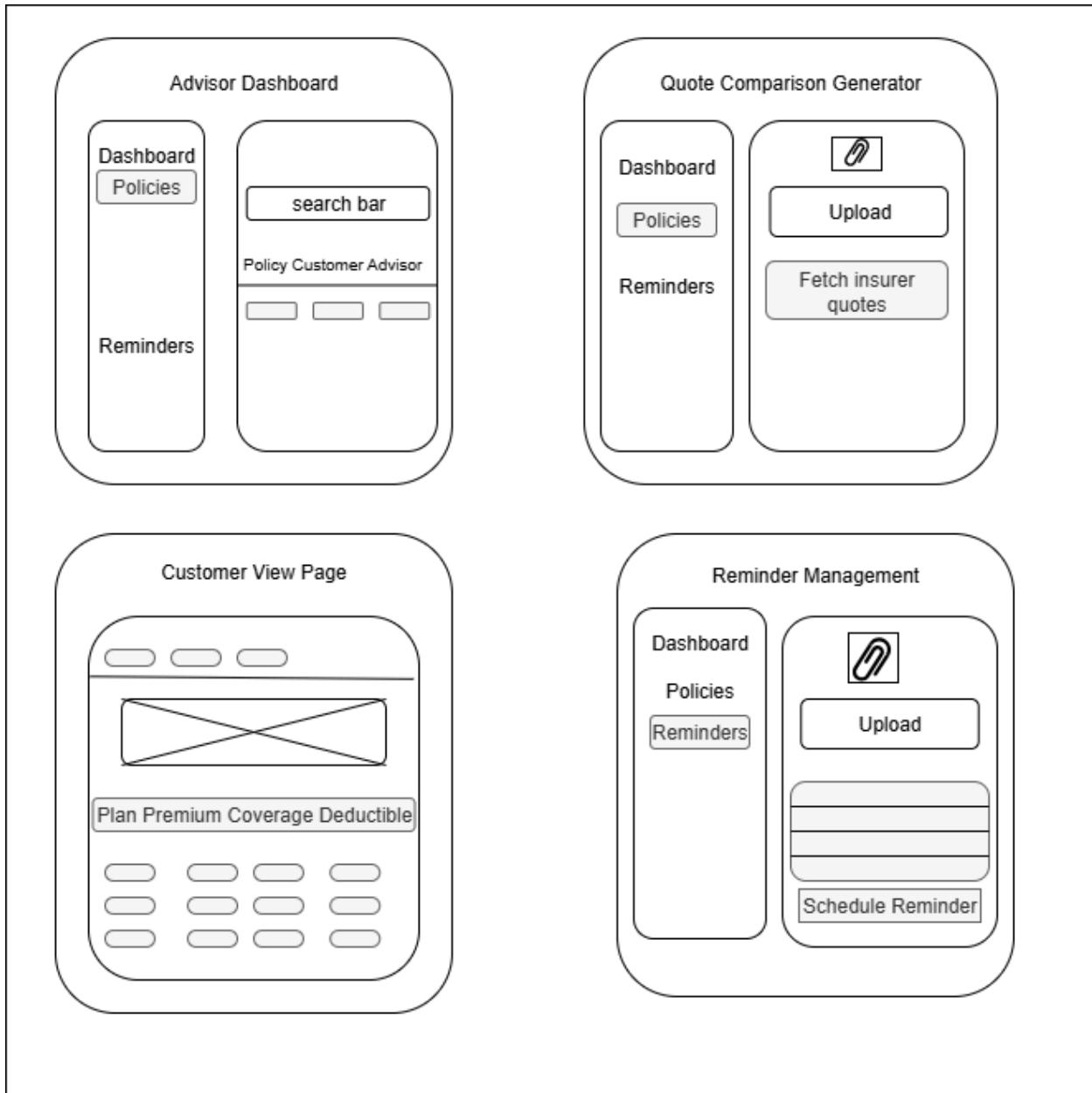


Figure 3 : Sample Wireframe

6. From the information provided, when quantified, what is the success criteria?

Based on data provided:

Current workload: 6,000 policies/month × 15 minutes = 1,500 hours/month

Team size: 50 advisors → 30 hours/advisor/month

Success Criteria:

80% reduction in manual time (target: <3 minutes per policy)

90%+ retention rate maintained or improved

100% of renewal reminders sent automatically, 60 days prior

Launch of customer quote portal by 1 April 2024

100% compliance with data privacy/security regulations