

Oaks Insurance Agency Quote Request Web App

By: Aolani Azleen Oaks

Phase 1: Foundation (Weeks 1-2)

Week 1: Design & Setup Combined

- **Days 1-3:** Figma mockups & user flow (low-fidelity is fine)
- **Days 4-5:** GitHub setup, initialize React + Express
- **Days 6-7:** Get basic app running with routing structure

📦 Deliverable: Mockups done + boilerplate code running

Week 2: Core Infrastructure

- Build landing page with category navigation
- Set up form component structure (reusable)
- Implement React Router for navigation

📦 Deliverable: Working landing page with clickable categories

Phase 2: Core Development (Weeks 3-5)

Week 3: Forms Sprint 1

- Build 3 priority forms (Auto, Home, General Liability)
- Implement form validation (required fields)
- Test form state management

📦 Deliverable: 3 working forms with validation

Week 4: Forms Sprint 2

- Complete remaining 3 forms (Workers Comp, Life, Other)
- Ensure consistent validation across all forms

📦 Deliverable: All 6 forms functional

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Week 5: Backend Integration

- Set up Express routes for form submissions
- Integrate Nodemailer or EmailJS (pick one by mid-week)
- Test end-to-end submission → email delivery

📦 Deliverable: Working email system

Phase 3: Polish & Testing (Weeks 6-7)

Week 6: UI/UX & Styling

- Apply CSS/styling to all pages
- Ensure mobile responsiveness
- Add agency logo and contact info to dashboard

📦 Deliverable: Polished, professional-looking UI

Week 7: Testing & Bug Fixes

- Set up Selenium for automated testing
- Run through all user flows manually
- Get initial feedback from your husband/dad
- Fix critical bugs

📦 Deliverable: Stable MVP ready for user testing

Phase 4: Validation & Enhancement (Weeks 8-9)

Week 8: User Testing & Iteration

- Have 3 agents + 5 clients test the app
- Collect feedback via Google Forms
- Prioritize fixes (important vs. nice-to-have)
- Implement critical feedback

📦 Deliverable: User-validated MVP

Week 9: Post-MVP Features

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- Add file upload capability
- Set up PostgreSQL database (if time permits)
- Weekly check-in with agent for refinement

📦 Deliverable: Enhanced version with file uploads

Phase 5: Deployment & Documentation (Week 10)

Week 10: Launch Week

- Deploy to Render
- Troubleshoot deployment issues
- Write README with setup instructions
- Final testing on live URL

📦 Deliverable: Live, deployed application

Phase 6: Buffer & Presentation (Weeks 11-12)

Week 11: Buffer Week (Optional)

Use this only if needed for:

- Major bug fixes
- Additional polish
- Early presentation prep

Week 12: Showcase Prep

- Create presentation slides
- Record demo video
- Practice walkthrough
- Prepare for questions

📦 Deliverable: Final presentation ready

Key Success Strategies

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Work Smart

- **Reusable components:** Build one form component that adapts to different insurance types
- **Decision deadlines:** Choose Nodemailer vs EmailJS by Week 5, Day 3 (don't waffle)
- **Defer nice-to-haves:** PostgreSQL and React Native can wait until after semester

Weekly Time Commitment

- **Weeks 1-5:** 15-20 hours/week (heavy development)
- **Weeks 6-9:** 12-15 hours/week (polish & testing)
- **Weeks 10-12:** 8-10 hours/week (deployment & presentation)

Risk Mitigation

- If forms take longer than Week 4, skip styling temporarily and come back to it
- If email integration is problematic, have a backup (simple form submission to database, manual email)
- Keep PostgreSQL as stretch goal—email delivery is more critical for MVP

Built-in Checkpoints

- **End of Week 5:** All forms + email = functional MVP
- **End of Week 7:** Polished, tested app
- **End of Week 10:** Deployed and done
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