# Logo AIA new

# iMO Smart

Phase 3.2 Business Requirement

, 2018

Sign off page [iMO Smart Phase 3]

The benefits of iMO Smart;

1. Reduce cost of sending notification through SMS
2. Improve security when sending customer information to customer

|  |  |  |  |
| --- | --- | --- | --- |
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# Introduction

One of notification channel communicate between AIA and AIA agent is send by SMS, The problem is there is no security to identify the valid phone no. and also high cost of SMS. As a result new communication channel will help us to improve sending to the valid target agent, security login, reduce cost per message and also reduce gap of delay between situation and message delivery.

# Objectives

1. Replace SMS notification with LINE messages to include more relevant information and provide recommended actions to agent
2. Add claim transaction notification to satisfy agency voting result in 2017 LICA
3. Reduce the lead time to send notification, minimizing gap between actual situation update and notification delivery, resulting in more timely action taken by agent
4. Improve security through agent identity verification process through AIA internal SSO server
5. Utilize line business connect messaging quota to reduce cost of sending notification to agent instead of using SMS

# Project Scope

|  |  |  |
| --- | --- | --- |
| **Phase** | **Scope** | **Timeline** |
| 1 | - News feed push notification - Basic login by agent code, DOB | Jul-17  (Completed) |
| 2 | - AWA login - Personalize push notification  - iMO smart setting | Feb-18 |
| 3.1 | - Rich menu (Policy enquiry, Claim status) | Q3 2018 |
| 3.2 | My Day (Customer birthday, ECM Daily) | Q4 2018 |
| 4 | Chatbot | Q4 2018 |

# Project Outline – Main Changed

|  |  |  |
| --- | --- | --- |
| **Tasks** | **As-is (SMS)** | **To-be (Line)** |
| Secure login | No | Yes, Single sign-on |
| NB status | T+1 notification | 2 hours after status changed |
| Claim notification | No | Yes |
| Selectable notification | No | Yes, Through AL account or self account |

# User Requirements

**My Day**

**RQ\_MD\_001**

|  |  |
| --- | --- |
| **Category** | New rich menu |
| **Sub-Category** | Rich menu |
| **Sequence** | - |

**Requirement Details**

Update new rich menu to support MyDay function



* Add Myday button with postback event to show Myday menu
* iMO Smart to reply with Myday menu below when this postback event triggered
* Birthday menu to link to Birthday function (RQ\_MD\_002)
* ECM Daily menu to link to ECM Daily function (RQ\_MD\_xxx)

**RQ\_MD\_002**

|  |  |
| --- | --- |
| **Category** | Birthday |
| **Sub-Category** | Rich menu |
| **Sequence** | MyDay Rich menu -> Birthday menu |

**Requirement Details**

System to show list of customers under latest servicing agent who has birthdate = current date

Case 1: There are >= 1 customer

* System to reply with 2 messages, First is text message with below text

“\uDBC0\uDC76 รายชื่อลูกค้าที่มีวันคล้ายวันเกิดประจำวันนี้”

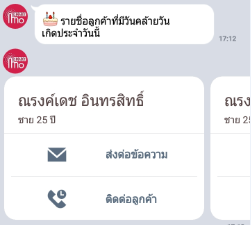
* Second message is to show as carousel message type 1 column for 1 customer with information below

Customer’s full name

Age

Forward button (With default message setup)

Contact customer button -> Call button with customer’s phone no., to show as “ไม่มีเบอร์ติดต่อ” if contact no. is NULL



Case 2: No customer under agent has birthdate = current date

To reply with only 1 text message



**RQ\_MD\_003**

|  |  |
| --- | --- |
| **Category** | ECM Daily - Notification |
| **Sub-Category** | Notification |
| **Sequence** | - |

**Requirement Details**

iMO Smart to push 3 ECM leads to agent by every other day at 11AM with Logic to retrieve data from source and selection criteria below

Retrieve data from source

iMO Smart to create 2 new tables with field details below

1. **ECM Campaign table**: Campaign details table to be manually config and request to upload by BU

|  |  |  |
| --- | --- | --- |
| **Field name** | **Details** | **Sample** |
| CAMPAIGN\_CD | Campaign unique code | SIOCIS\_2018 |
| CAMPAIGN\_NAME | Campaign name | โครงการ SIO-AIA CI SuperCare |
| CAMPAIGN\_TH | Campaign name in Thai | โครงการ SIO-AIA CI SuperCare |
| CAMPAIGN\_ENG | Campaign name in English | SIO-AIA CI SuperCare |
| CAMPAIGN\_START\_DT | Start date | 12/25/2017 |
| CAMPAIGN\_END\_DT | End date | 12/31/2018 |
| LAST\_UPDATE\_DT | Last sync date from Data warehouse | 06/22/2018 |
| LAST\_UPDATE\_DT | Next update date, config from user | 07/22/2018 |
| IMG\_URL | Imagemap URL for campaign details |  |
| IMG\_CONTENT\_URL | URL for campaign content setup in iMO Smart CMS | https://smart.aia.co.th/contents?cid=52 |
| CAMPAIGN\_PRIORITY | Running number Highest priority is 1 | 1 |

**2. ECM Details table:** Table to keep leads from DWH in iMO Smart

**\*Red field is not in DWH**

|  |  |  |
| --- | --- | --- |
| **Field name** | **Details** | **Sample** |
| CAMPAIGN\_CD | Campaign unique code | SIOCIS\_2018 |
| CAMPAIGN\_PRIORITY | Same as ECM\_Campaign table Highest priority is 1 | 1 |
| AGENT\_CD | Agent code | 0000260846 |
| AGENCY\_LEADER\_CD | AL code | 0000095405 |
| INSURED\_NAME | Insured name | พีระวัฒน์ |
| INSURED\_SURNAME | Insured surname | รัศมีชวลิต |
| INSURED\_AGE | Insured age | 20 |
| INSURED\_GENDER | Insured gender M = Male F = Female | M |
| SUM\_ASSURED | Sum assured amount | 2240000 |
| SERVICE\_AGENT\_TYPE | Service agent type O = Original A = Assigned | O |
| MOBILE\_PHONE | Insured mobile phone no. \*Nullable | 0636946554 |
| VIP\_IND | VIP Indicator Y = Yes N = No | Y |
| COLUMN\_NAME\_5 | ประกันภัยหลัก\* | 20PLP5-200,000  P21EUPB-500,000 |
| COLUMN\_NAME\_6 | สัญญาเพิ่มเติมสุขภาพ\* | H&S-2200  HB-500 |
| COLUMN\_NAME\_7 | สัญญาเพิ่มเติมมะเร็งและโรคร้ายแรง\* | CR-1,000,000 |
| COLUMN\_NAME\_8 | สัญญาเพิ่มเติมอุบัติเหตุ\* | - |
| COLUMN\_NAME\_9 | สัญญาเพิ่มเติมอื่นๆ\* | WP-500,000 |
| LAST\_PURCHASE\_DT | วันที่ลูกค้าซื้อครั้งล่าสุด |  |
| ACCEPT\_FLAG | New field, Default null Y / N | Y |
| REJECT\_FLAG | New field, Default null Y / N |  |
| REJECT\_REASON | Reject reason selected from user |  |
| ACCEPT\_REJECT\_DATE | Timestamp when user click either Accept or Reject |  |
| NOTIFICATION\_DATE | Timestamp when lead push to agent  Default NULL |  |

**1. Logic to refresh data from source**

Daily batch to check each campaign in ECM\_CAMPAIGN table

When Current date = ECM\_CAMPAIGN.LAST\_UPDATE\_DT + ECM\_CAMPAIGN.DAY\_TO\_REFRESH

Then Update all leads in ECM\_DETAILS

Where ECM\_DETAILS. CAMPAIGN\_CD = ECM\_CAMPAIGN.CAMPAIGN\_CD

**2. Logic for ECM Daily leads selection**

Select 3 leads fromECM\_DETAILS **where** ECM\_DETAILS**.**ACCEPT\_REJECT\_DATE is NULL and Current date - LEAD**.**NOTIFICATION\_DATE >=2 order by ECM\_DETAILS**.**CAMPAIGN\_PRIORITY, ECM\_DETAILS**.**SUM\_ASSURED

**3. Logic to warning / skip ECM campaign**

Daily batch to check leads in #2

\*\***Warning user to accept / reject leads when no action for 7 days**

If LEAD**.**ACCEPT\_REJECT\_DATE is NULL and Current date - LEAD**.**NOTIFICATION\_DATE =6

Then push text message as “\uDBC0\uDC35 กรุณากด ติดต่อทันที / ไม่สนใจ เพื่อรับข้อมูลใหม่ในวันถัดไป \uDBC0\uDC35”

**\*\*Skip current campaign when no action for more than 7 days**

If LEAD**.**ACCEPT\_REJECT\_DATE is NULL and Current date - LEAD**.**NOTIFICATION\_DATE >= 7

**Then Update** ECM\_DETAILS**.**ACCEPT\_REJECT\_DATE = Current date where ECM\_DETAILS.CAMPAIGN\_CD = LEAD.CAMPAIGN\_CD

**ECM Daily Leads message template**

1 Push message with 4 carousel columns

|  |  |
| --- | --- |
|  | **1st Image column**  Image URL: ECM\_Campaign.IMG\_URL  Action URL: ECM\_Campaign.IMG\_CONTENT\_URL |
|  | **2nd - 4th Lead column**  ECM\_Campaign.CAMPAIGN\_NAME  ECM\_DETAILS.INSURED\_NAME  ECM\_DETAILS.VIP\_IND  ECM\_DETAILS.INSURED\_AGE  ECM\_DETAILS.COLUMN\_NAME\_5  ECM\_DETAILS.COLUMN\_NAME\_6-9  ECM\_DETAILS. LAST\_PURCHASE\_DT  ECM\_DETAILS.SERVICE\_AGENT\_TYPE  2 Action buttons \*\*Will be take action only when ECM\_DETAILS.ACCEPT\_REJECT\_DATE is not null  ติดต่อทันที (Accept)  Keep log in ECM\_DETAILS table at lead record   * Update ECM\_DETAILS.ACCEPT\_FLAG = Y and ECM\_DETAILS.ACCEPT\_REJECT\_DATE = Current date time * Show contact customer message with ECM\_DETAILS. MOBILE\_PHONE,If field is NULL then display button as “ไม่มีเบอร์ติดต่อ”     ไม่สนใจ (Reject)  Keep log in ECM\_DETAILS table at lead record   * Update ECM\_DETAILS.REJECT\_FLAG = Y and ECM\_DETAILS.ACCEPT\_REJECT\_DATE = Current date time * Show reject reason message and keep in ECM\_DETAILS.REJECT\_REASON      * Not keep reason when ECM\_DETAILS.REJECT\_REASON is not NULL |
|  | 2nd row message only when no action for 7 days |

**RQ\_MD\_004**

|  |  |
| --- | --- |
| **Category** | ECM Daily - MyDay |
| **Sub-Category** | Rich menu |
| **Sequence** | MyDay Rich menu -> ECM Daily |

**Requirement Details**

System to show ECM leads as same as ECM notification, System to select 3 latest leads in ECM\_DETAILS table and reply with the same format as **RQ\_MD\_003**

Select top 3 leads from ECM\_DETAILS Order by ECM\_DETAILS.NOTIFICATION\_DATE desc where ECM\_DETAILS.NOTIFICATION\_DATE is not NULL

Project Governance Structure

**Project Sponsor**

Aekkaratt Thitimon

**Project Owner**

Prindhorn

**Project Manager**

Pongsathon

**Operation System**

**Stakeholders**

- ADP

- HSM

- Operation

**Project Owner**

**Project Owner**

Attaporn

# Project Timeline