# PURPOSE

The purpose of this document is to capture and validate the project sponsor and primary stakeholders’ view of the project to set the stage for requirements development.

# Business Requirements

This is a heading section and nothing needs to be entered here. The business requirements provide the foundation and reference for all requirements development.

## Background

Quote Request Forms (QRF) are currently available on AmFam.com allowing customers and prospects the capability to send a request for an insurance quote to an agent.

The current process provides the following capabilities within an HTML form for the prospect/customer to provide information as part of the request:

* Provide Personal Information
* Provide Method of Contact
* Select Product(s) for Quote
* Provide Comments
* Select an Agent
* Submit Request
* Return Online Confirmation

Upon completing and submitting the request a QRF notification is sent via email to the agent along with the request details.

The current state QRF process is limited in usage as it is only accessible via AmFam.com and is not enhanced for tablet or mobile access. A strategic goal is to increase quote requests for agents by widening the QRF channel by making the process accessible via Agent websites, and expanding underlying technology to support tablets and mobile devices. Also, by providing the customer/prospect with targeted questions based on their product interests the agent shall garner additional information for guiding sales conversations.

Summarize the rationale for the new product by providing a general description of the history or situation that lead to the decision to build/buy the product.

## Business Opportunity

Increase insurance sales through expansion of the Quote Request Form process.

Describe the business problem that is being solved. Describe why the proposed product is attractive and what competitive advantage it provides. Identify problems that cannot be currently solved without the product. Describe how the product aligns with corporate strategic direction.

## Business Objectives and Success Criteria

The purpose of the Quote Request Form Enhancement project is to:

* Enhance the Quote Request Form process to be accessible in either English or Spanish via AmFam.com and Agent Website across PC, Tablet and Mobile operating platforms
* Capture additional user and product specific information
* Implement reporting capabilities to understand how the QRF is being used and allow for match back capabilities in the future

So that:

* Amount of quote requests is increased due to expanded reach and scope
* Agents close a greater percentage of leads with the assistance of additional user information
* Leads through quotes can be attributed to new business

Why are we doing this project? That is the question to be answered in this section.

Project goals are formulated to achieve business objectives. Project benefits quantify the degree to which the project will contribute to the realization of the business objectives. Collectively, the project goals and project benefits are the projects’ “Business Requirements.”

Summarize the important business benefits the product will provide, in a way that is quantitative and measurable. These objectives could relate to revenue estimates, cost savings, return on investment analysis and target release dates. Determine how success will be defined and measured on this project, and describe the factors that are likely to have the greatest impact on achieving success. Establish measurable criteria to assess whether the business objectives have been met.

## Customer Needs

Agent needs require to having pertinent product information with the users request in a timely manner.

Describe the needs of the typical customer, include needs not being met by existing information systems. Present the problems customers are currently encountering that the new product will address and provide examples of how the customer would use the product. Identify the hardware and software environment in which the product must operate. Define at a high level any known critical interface or performance requirements. Avoid including design and implementation details.

## Business Risks

Summarize the major business risks associated with developing or buying this product, such as user acceptance, implementation issues or possible negative impacts on the business.. Estimate the severity of the risks, and identify any risk mitigation actions you can take.

# Vision of the Solution

Use the topics within this section to summarize the long-term purpose and intent of the new product that will address the business objectives. This vision provides the context for making decisions throughout the course of the software development life cycle. Do not include detailed functional requirements or project planning information. This is a section heading and no entry needs to be made here.

## Vision Statement

To build a Quote Request Form tool (QRF) which will enable an American Family customer or prospect to request a quote from an agent for specified insurance products. The user will be prompted to provide personal information, contact information, and to specify the products they are interested in receiving a quote for. Based on the products selected they user shall be prompted with product specific questions.

The user shall be able to either select an agent or have an agent assigned to contact them concerning their quote request. However, if the QRF tool is initiated via an agent website then the system shall assign this agent.

Upon submitting their request the user shall receive an online confirmation and an email confirmation; and the assigned agent shall receive an email communication with the user provided information.

The QRF tool and customer confirmation email is to be available in both English and Spanish. The look and feel of the application is to be consistent with newer tools such as the Life Insurance Needs Calculator, Auto Quote, and Annuities Calculator. Mobile user shall receive an experience optimized for mobile devices.

Write a concise vision statement that summarizes the long-term purpose and intent of the new product. The vision should reflect a balanced view that will satisfy the needs of diverse customers. It can be somewhat idealistic, but should be grounded in the realities of our enterprise architecture, corporate strategies, and resource limitations.

## Major Features

* Capability to send a request for a quote
  + Provide Personal Information
  + Provide Method of Contact
  + Select Product(s) for Quote
  + Provide Product Level Questions and Responses
  + Capture Comments
  + Select an Agent
  + Submit Request
* Customer Notifications
* Agent Notification
* Capture statistics for process analysis

List major features or user capabilities the new product will provide, emphasizing features that differentiate it from existing products. Number the listed items so user requirements and system requirements can be traced back to these features.

## Assumptions and Dependencies

Record any assumptions you are making in this document. Note any major dependencies (technologies to be used, vendors, business relationships, other projects).

# Scope and Limitations

## Scope of Initial Release

1. Quote Request Form tool integrated with AmFam.com and Agent Website accessible via PC, tablet and mobile devices
2. Agent notification email and Quote Request Confirmation email routed via Responsys
3. Omniture data tags for report metrics

Summarize features that will be included in the initial release. Describe the quality characteristics that will enable the product to provide the intended benefits to its various stakeholders. Focus on the accomplishing the basic objectives of the system, using subsequent releases to include additional features, options, and usability aids.

List any product features or characteristics a stakeholder may expect, but that you do not plan to include in the product.

# Business Context

## Stakeholders

| Stakeholder Name | Major Interests | Comments |
| --- | --- | --- |
| Jose Rivera | Web Experience Manager; owner of AmFam.com experience and tools |  |
| Mike Peroutka | Web Experience Administrator; process owner of Quote Request Forms |  |
| Jason Hoover | Interactive Media Administrator; owner of technology for tool development |  |

Stakeholder Name - Unique name for a Stakeholder that is not the name of an individual person, but the name of a group of people or an organization who have vested interest in the system being developed. They are actively involved in a project, are affected by its outcome, can influence its outcome or are impacted by the implementation. Examples of Stakeholder Names may be:

* LEBO Accounts receivable
* Sears
* Internal Revenue Service
* Developers
* Enterprise Operations Center (EOC which includes Help Desk & Computer Operations)

Major Interests For stakeholders, describe what needs must be met by the system being developed or needs that must be met in order to support the system once it is in the production environment. Examples of stakeholder interests include:

* Improved productivity
* Reduced rework
* Cost savings
* Streamlined business processes
* Automation of previously manual tasks
* Ability to perform entirely new tasks or functions
* Conformance to current standards or regulations
* Improved usability or reduced frustration level compared to current applications

Comments Other comments or factors to bear in mind

## Operating Environment

Describe the environment in which the system will be used and define the major availability, reliability, performance, and integrity requirements. This information will significantly influence the definition of the system’s architecture. Consider questions such as:

*Are the users widely distributed geographically or located close to each other? How many time zones are they in?*

*When do the users in various locations need to access the system?*

*Where is the data generated and used? How far apart are these locations? Does the data from multiple locations need to be combined?*

*Are specific maximum response times known for accessing data that might be stored remotely?*

*Can the users tolerate service interruptions or is continuous access to the system critical for the operation of their business?*

*What access security controls and data protection requirements are needed?*

## Change History:

|  |  |
| --- | --- |
| **Date** | **Change** |
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