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1. **Donegal - UW Efficiency Summary Assistant**

The uploaded dataset contains the following key columns:

QuoteNumber: Another way to group and track data trends.

UWName: The name of the underwriter handling the policy.

TimeTakenInDays: Time taken to change the status.

Underwriter Performance Metrics

Underwriter Response Time (UWResponseTime)

Measures the number of days between when a policy is left idle and when an underwriter takes action to review and update its status.

Expected Output:

Average UW Response Time: X days

Maximum UW Response Time: X days

Minimum UW Response Time: X days

Underwriter Efficiency

High Efficiency: If an underwriter takes 2 days or less to act on a policy.

Low Efficiency: If an underwriter takes more than 2 days to act on a policy. A delayed response can lead to potential revenue loss.

Expected Output:

High Efficiency (= 2 days): X underwriters

Low Efficiency (> 2 days): X underwriters

List of High-Efficient Underwriters: [Names]

List of Low-Efficient Underwriters: [Names]

UW Response Time

The uploaded dataset contains the following key columns:

QuoteNumber: Another way to group and track data trends.

UWName: The name of the underwriter handling the policy.

TimeTakenInDays: Time taken to change the status

Format the response exactly as shown below, with no extra commentary or processing updates. Show only the important phrases from the task.

Summarize the data:

Show the no. of days an underwriter takes to act on a policy and then find the average, maximum, and minimum number for the same.

Show the count of high-efficient and low-efficient underwriters based on whether they take <= 2 days or >2 days to act on a policy.

Based on the above statistics, calculate the amount of premium loss that might be incurred due to low-efficient underwriters.

Provide insightful recommendations to address the issue of low-efficient underwriters.

**Expected Output:**

\*\*UW Response Times\*\*

Average UW Response Time: X days

Maximum UW Response Time: X days

Minimum UW Response Time: X days

\*\*Underwriter Efficiency\*\*

No. of High-Efficient Underwriters: X

No. of Low-Efficient Underwriters: X

Output:

1. **Donegal - Drop-Off Summary Assistant**

User Drop-Off Analysis Report

Overall User Drop-Off Statistics

* Total Unique Pages with User Drop-Offs: Count of distinct PageName values where drop-offs occurred
* Total User Drop-Offs Across All Pages: Sum of UserDropOffCount from all pages.

Page-Wise Breakdown

* User Drop-Offs Per Page: Lists each PageName along with its corresponding UserDropOffCount
* Helps identify specific areas where users are leaving the process.

High-Impact Areas

* Page with the Highest Drop-Offs:
* The PageName with the maximum UserDropOffCount.

Most Frequent Step Where Users Abandon the Process:

Identifies the most commonly occurring PageName in drop-off cases.

Error & Drop-Off Correlation

Common Error Types Leading to Drop-Offs:

Extracts unique values from ErrorType, showing error patterns associated with user abandonment.

Validation Errors Associated with Drop-Offs:

Filters drop-offs where ErrorType relates to form validation failures.

UW (Underwriting) Block Errors Encountered:

Counts occurrences of underwriting-related errors from ErrorType.

Security Errors Contributing to Drop-Offs:

Identifies drop-offs linked to security-related errors in ErrorType.

Revenue Impact Analysis

Estimated Revenue Loss Due to Drop-Offs:

Sum of TotalRevenueLost across all pages, representing potential financial impact.

Page with the Highest Revenue Impact Due to Drop-Offs:

The PageName with the highest TotalRevenueLost.

Correlation Between Drop-Off Rates and Revenue Loss:

Analyzes trends between UserDropOffCount and TotalRevenueLost to determine financial risks.

Actionable Insights & Recommendations

Pages Needing Improvement to Reduce Drop-Offs:

Lists PageName values with the highest UserDropOffCount and significant ErrorCount.

Potential UX or Technical Improvements Suggested:

Based on error patterns (ErrorType), suggests solutions like form validation enhancements, performance optimizations, or security fixes.

Overall User Drop-Off Statistics

Total Unique Pages with User Drop-Offs: Count of distinct PageName values where drop-offs occurred

Total User Drop-Offs Across All Pages: Sum of UserDropOffCount from all pages.

Page-Wise Breakdown

List each PageName along with its corresponding UserDropOffCount High-Impact Areas

Page with the Highest Drop-Offs:

The PageName with the maximum UserDropOffCount

ErrorCount: counts number of errors encountered for each page

TotalRevenueLost: amount lost due to users dropping off at the page

Format the response exactly as shown below, with no extra commentary or processing updates. Show only the important phrases from the task.

Most Frequent Step Where Users Abandon the Process:

Identifies the most commonly occurring PageName in drop-off cases.

Error & Drop-Off Correlation

Common Error Types Leading to Drop-Offs: Extracts unique values from ErrorType, showing error patterns associated with user abandonment.

List the errors showing the number of drop-offs occurred for each error type (highest to lowest)

Revenue Impact Analysis

Estimated Revenue Loss Due to Drop-Offs: Sum of TotalRevenueLost across all pages, representing potential financial impact

Page with the Highest Revenue Impact Due to Drop-Offs: The PageName with the highest TotalRevenueLost.

Correlation Between Drop-Off Rates and Revenue Loss: Analyzes trends between UserDropOffCount and TotalRevenueLost to determine financial risks.

Provide Actionable Insights & Recommendations for the following:

Pages Needing Improvement to Reduce Drop-Offs: Lists PageName values with the highest UserDropOffCount and significant ErrorCount.

Potential UX or Technical Improvements Suggested: Based on error patterns (ErrorType), suggests solutions like form validation enhancements, performance optimizations, or security fixes.

If there is any other identifiable trend, highlight it.

1. **Donegal - SIU SUBMISSION COUNT**

AI Summary Prompt for Submission Data Analysis

\*"Analyze the given dataset and provide a structured summary based on the PeriodLabel, which represents different time periods based on the selected parameter:

- If 'Last 24 hours', summarize by hourly trends.

- If 'Last Week', summarize by daily trends.

- If 'Last Month', summarize by weekly trends.

\*\*Dataset Information:\*\*

The given dataset contains the following columns:

- \*\*PeriodLabel\*\* – Represents the time period (Hour, Day, or Week).

- \*\*SubmissionCount\*\* – The total number of submissions in that period.

- \*\*AgencyNames\*\* – A list of agencies along with their respective submission counts.

\*\*Expected Summary Format:\*\*

- \*\*Peak submission periods\*\* (Identify the hours, days, or weeks with the highest submission counts).

- \*\*Top contributing agencies\*\* along with their submission frequencies.

- \*\*Notable trends\*\*, such as steady increases, declines, or unusual spikes.

- \*\*Unusual patterns\*\*, like repeated single submissions or agencies missing from key periods.

- \*\*Overall submission distribution\*\* and key takeaways.

Ensure the summary is concise, data-driven, and easy to interpret."

AI Summary Prompt for Submission Data Analysis

Analyze the given dataset that contains the following columns:

PeriodLabel: It represents different time periods (‘Last 24 hours’, ‘Last Week’, ‘Last Month’)

SubmissionCount: The total number of submissions in that period

AgencyNames: A list of agencies with their respective submission counts

Format the response exactly as shown below, with no extra commentary or processing updates. Show only the important phrases from the task.

Summarize the data such that it is concise, data-driven, and easy to interpret

Show the number of submissions summarized by hourly, daily, or weekly trends based on the selected period

Show the agencies and their respective submission counts

Show any unusual trends in submissions (repeated single submissions) or agencies (missing from key periods)

Show agencies that have consistently had highest submissions in 3 consecutive weeks

Show the revenue earned from the agencies with highest number of submissions

Show the agencies with a greater number of submissions but have very less contribution towards the revenue

**Sample Output:**

Peak Submission Periods

Week 4: had the highest submission count with a total of 272 submissions

Top Contributing Agencies

Week 1: Hylant Group Inc (36), Alliant Insurance Service (31), Alkeme (24)

Week 2: Alkeme (29), Alliant Insurance Service (29), Hylant Group Inc (26)

Notable trends

Increases: Significant increase noted in Week 4 with the highest submissions.

Decreases: Observed in Weeks 2, 3, and 5 with a drop in submissions compared to the previous week.

Unusual spikes

Revenue Gain:

Agency X: Y submissions with a revenue of $Z

Agency P: Q submissions, but contributes only $R towards the revenue

1. **Donegal - SIU Submission Counts Per IP**

SIU Submission Count Per IP

ClientIP: IP address;

SubmissionCount: Counts the number of submissions from different IP addresses

Sample Output:

Top IPs by submission count: 124.40.245.188: 434 106.51.192.216: 48 157.45.44.51: 31

Key Prompts

Calculate the percentage of submissions from each IP address.

Show top IPs by submission count, highlighting the highest submission activity.

Do not be verbose.

SIU Submission Count Per IP

The dataset contains the following columns:

ClientIP: IP address;

SubmissionCount: Counts the number of submissions from different IP addresses

Format the response exactly as shown below, with no extra commentary or processing updates. Show only the important phrases from the task.

**Sample Output:**

Top IPs by submission count:

124.40.245.188: 434 (62.59%)

106.51.192.216: 48 (3.79%)

157.45.44.51: 31 (3.67%)

IP Address ‘124.40.245.188’ has the highest submission activity.

IP Address ‘106.51.195.92’ has the highest number of successful submissions and contribute $X towards the revenue.

IP Address ‘106.51.198.240’ has the highest number of errored submissions

Summarize the data in a concise and data-driven manner

Calculate the percentage of submissions from each IP address

Show top IPs by submission count, highlighting the highest submission activity.

Show the IPs that had the highest number of successful submissions

Show the IPs that encountered highest number of errored submissions

Show the IPs with highest contribution towards the revenue

1. **Donegal - Session Grid Assistant**

User Sessions Count:   
UserId: Name of the user   
TotalSessionDuration: Total duration of each session for each user   
Show the ranking of users by total session duration from longest to shortest   
Show the user with longest total session duration   
Show the user with shortest total session duration

User Sessions Count:   
UserId: Name of the user   
TotalSessionDuration: Total duration of each session for each user

Format the response exactly as shown below, with no extra commentary or processing updates. Show only the important phrases from the task. Do not be verbose.

**Sample Output:**

Users with total session duration (longest to shortest)

Theo: 4280 seconds

Remi: 2838 seconds

Claire: 2766 seconds

Users with no successful submissions:

Rae: 2736 seconds

Cara: 2616 seconds

Alex: 2387 seconds

Total Premium Loss:

$X was the total premium loss for users Rae, Cara, and Remi who did not have any successful submissions

User with shortest total session duration

Alex: 2387 seconds

Outliers:

Summarize the data in a concise and data-driven manner

Show ranking of users by total session duration (longest to shortest) and their respective successful submissions

Show users with long total session duration and did not have successful submissions

Show the total premium loss for users having long total session duration with no successful submissions.

Show the user with shortest total session duration

Show outliers, if any and explain the reason for the same

1. **Donegal - UW Quote Response Time Assistant**

UW Response Time Quote Response Time

The dataset contains the following columns

Quote Response time: amount of time taken to provide a quote

Quotation Number: quotation number

NumberOfBuildings: number of buildings associated with a quotation

NumberOfLocations: number of locations associated with a quotation

Sample Output:

Quotations with response times ranked from longest to shortest

<Quotation Number> : <Quote Response time>

<Quotation Number> : <Quote Response time>

<Quotation Number> : <Quote Response time>

<Quotation Number> : <Quote Response time>

Number of quotations: 10

Quotations with highest number of buildings

<Quotation Number> : <NumberOfBuildings>

<Quotation Number>, <Quotation Number> : <NumberOfBuildings>

Quotations with highest number of locations:

<Quotation Number> : <NumberOfLocations>

<Quotation Number>, <Quotation Number> : <NumberOfLocations>

Successful Quotations:

<Quotation Number>, <Quotation Number>

Submissions in Quoted status:

<Quotation Number>, <Quotation Number>

Summarize the data Show the quotation numbers in the selected date range along with time it took to provide the quote

Identify quotations with no buildings or locations or both

Highlight quotations with highest number of buildings and locations

Show errored quotations and classify them by error type, noting if there are trends or cluster of errors

Prompts:

1. Which submission had the longest quote response time?

2. How many submissions with longest quote response times resulted in a successful submission?

3. How many submissions halted at Quoted status?

4. What are the longest and shortest quote response times?

5. Which quotations had the highest number of buildings or locations?

Do not be verbose

UW Response Time Quote Response Time

The dataset contains the following columns

Quote Response time: amount of time taken to provide a quote

Quotation Number: quotation number

NumberOfBuildings: number of buildings associated with a quotation

NumberOfLocations: number of locations associated with a quotation

Format the response exactly as shown below, with no extra commentary or processing updates. Show only the important phrases from the task.

Sample Output:

\*\*Top 5 Quotations ranked from longest to shortest response times \*\*

<Quotation Number> : <Quote Response time>

\*\*Top 5 Quotations with highest number of buildings \*\*

<Quotation Number> : <NumberOfBuildings>

<Quotation Number>, <Quotation Number> : <NumberOfBuildings>

\*\*Top 5 Quotations with highest number of locations \*\*

<Quotation Number> : <NumberOfLocations>

<Quotation Number>, <Quotation Number> : <NumberOfLocations>

\*\*Successful Quotations: \*\*

<Quotation Number>, <Quotation Number>

\*\*Submissions in Quoted status: \*\*

<Quotation Number>, <Quotation Number>

Summarize the data

Show the quotation numbers along with time it took to provide the quote

Identify quotations with no buildings or locations or both

Highlight quotations with highest number of buildings and locations

Show errored quotations and classify them by error type, noting if there are trends or cluster of errors

Which submission had the longest quote response time?

How many submissions with longest quote response times resulted in a successful submission?

How many submissions halted at Quoted status?

What are the longest and shortest quote response times?

Which quotations had the highest number of buildings or locations?

1. **Donegal - Campaign Goals Assistant**

Campaign Goals Summary Analysis

You are provided with a dataset showing the performance of different campaign goals.

The dataset contains the following columns:

CampaignGoal: Identifier for the campaign goal.

SubmittedCount: Number of submissions made under the campaign.

QuotedCount: Number of quotes issued (currently all values are 0).

BindedCount: Number of policies successfully bound.

Your tasks:

Identify the campaign with the highest number of submissions.

Identify the campaign with the highest number of bindings.

Calculate the total number of submissions, bindings, and quotes across all campaigns.

Provide a brief insight on the current performance (e.g., all campaigns have 0 quotes, bindings trend, etc.).

Campaign Goals Summary Analysis

You are provided with a dataset showing the performance of different campaign goals.

The dataset contains the following columns:

CampaignGoal: Identifier for the campaign goal.

SubmittedCount: Number of submissions made under the campaign.

QuotedCount: Number of quotes issued (currently all values are 0).

BindedCount: Number of policies successfully bound.

Format the response exactly as shown below, with no extra commentary or processing updates. Show only the important phrases from the task.

Your tasks:

\*\*Identify the campaign with the highest number of submissions\*\*

\*\*Identify the campaign with the highest number of bindings\*\*

\*\*Calculate the total number of submissions, bindings, and quotes across all campaigns\*\*

\*\*Total Premium Amount from each of the campaigns\*\*

\*\*Identify any noticeable trends and highlight them\*\*

\*\*Provide a brief insight on the current performance\*\* (e.g., all campaigns have 0 quotes, bindings trend, etc.).

1. **Donegal - Average Time Spent CA Assistant**

Average Timespent CA User Engagement Summary:

You are given a dataset tracking user behavior across different pages.

Each row contains the following fields:

CurrentPage: Internal system name for a page

AvgTimeSpentSeconds1: Average time (in seconds) spent based on a percentile

SumTimeSpentSeconds: Total time spent on that page by users

UserCount: Number of unique users visiting the page

AvgTimeSpentSeconds: Percentile-adjusted average time

Mapping Requirement:

Before summarizing, use the following page name mapping to convert internal CurrentPage values into display names. Only show mapped display names in your response.

pageNameMapping = {

"Default": "Default",

"Product Eligibility": "Product Eligibility",

"BusinessInfo": "Business Info",

"BuildingDetails": "Vehicles",

"BuildingAdditionalCoverages": "Drivers",

"BuildingClassificationCoverages": "Coverages",

"BuildingClassificationAdditionalCoverages": "Symbols",

"UWQuestions": "Review",

"Payment": "Payment"

};

For any pages not listed in the mapping above, ignore them completely in your response — do not include them in analysis, charts, rankings, or summaries.

Tasks to Perform:

1. Page with Maximum Average Time Spent

Identify the page (from the mapped list) with the highest AvgTimeSpentSeconds.

Output:

Page name (mapped)

AvgTimeSpentSeconds in readable format (e.g., “5 mins 38 secs”)

Number of users

2. Page with Minimum Average Time Spent

Identify the mapped page with the lowest AvgTimeSpentSeconds.

Output:

Page name (mapped)

AvgTimeSpentSeconds in readable format

Number of users

3. Top 5 Pages by Avg Time Spent

Sort only the mapped pages by AvgTimeSpentSeconds in descending order.

Return top 5 with:

Page name

AvgTimeSpentSeconds

4. User Engagement Highlights

Identify:

Page with the highest number of users

Page with the highest average time per user (AvgTimeSpentSeconds / UserCount)

Output only display names (mapped)

5. Trend Analysis

Detect any notable usage patterns across the mapped display names.

For example: "Pages related to UWQuestions and Payment show consistently low engagement."

Average Timespent CA User Engagement Summary:

You are given a dataset tracking user behavior across different pages. The dataset contains the following columns:

CurrentPage: Internal system name for a page

AvgTimeSpentSeconds1: Average time (in seconds) spent based on a percentile

SumTimeSpentSeconds: Total time spent on that page by users

UserCount: Number of unique users visiting the page

AvgTimeSpentSeconds: Percentile-adjusted average time

Mapping Requirement:

Show only the relevant pages

Format the response exactly as shown below, with no extra commentary or processing updates. Show only the important phrases from the task.

Tasks to Perform:

\*\*Page with Maximum Average Time Spent\*\*

Identify the page with the highest AvgTimeSpentSeconds.

Page name:AvgTimeSpent in seconds in readable format (e.g., “5 mins 38 secs”)

Number of users: X

\*\*Page with Minimum Average Time Spent\*\*

Identify the mapped page with the lowest AvgTimeSpentSeconds.

Page name: AvgTimeSpent in seconds in readable format

Number of users: Y

\*\*Top 5 Pages by Avg Time Spent\*\*

Show the top 5 pages sort by AvgTimeSpentSeconds in descending order.

Return top 5 with:

Page name: AvgTimeSpent in seconds

\*\*User Engagement Highlights\*\*

Identify:

Page with the highest number of users

Page with the highest average time per user

Output only display names

Trend Analysis

Detect any notable usage patterns across the mapped display names.

Outliers:

Identify any outliers, if any and explain the reason for the same

1. **Donegal - Agency Premium Amount Report Assistant**

Total Premium Amount Summary Report

You are provided with a dataset containing key agency performance metrics, including:

AgencyName: Name of the agency

TotalPremiumAmount: The total premium amount generated through the agency

QuotationBindedCount: The count of quotations that got binded

QuotationSubmittedCount: The count of quotations that were submitted

QuotationCreatedCount: The count of quotations that were created

Analysis Requirements:

Identify the agencies with the highest and lowest Total Premium Amounts.

Provide the names of these agencies along with their respective premium values.

Example Output:

Agencies with the Highest Premium Amounts:

Alkeme: $33,572

Alliant Insurance Service: $32,330

Agencies with the Lowest Premium Amounts:

Rich & Cartmill Inc: $1,775

Robertson Ryan and Associates Agency: $1,810

Determine the agencies with the highest number of quotation submissions and creations.

Also, identify cases where agencies have a high number of submitted quotations but a relatively low binded count.

Example Output:

Agencies with the Highest Number of Quotation Submissions:

Alliant Insurance Service: 117 submissions

Hub International Ltd: 87 submissions

Agencies with the Highest Number of Quotation Creations:

Alliant Insurance Service: 18 created

Hub International Ltd: 14 created

Cases with High Submissions but Low Binded Counts:

Lockton Cos LLC: 60 submitted, but only 6 binded

Agency Not Mapped: 63 submitted, but only 3 binded

Analyze agencies with a high number of submitted quotations but a low number of binded quotations.

Highlight potential inefficiencies or gaps in conversion rates by calculating the conversion percentage (binded count / submitted count).

Example Output:

Agencies with Conversion Inefficiencies:

Agency Not Mapped: 63 submitted ? only 3 binded (Conversion Rate: 4.76%)

Lockton Cos LLC: 60 submitted ? only 6 binded (Conversion Rate: 10%)

Total Premium Amount Summary Report -

You are provided with a dataset containing key agency performance metrics, including:

AgencyName: Name of the agency

TotalPremiumAmount: The total premium amount generated through the agency

QuotationBindedCount: The count of quotations that got binded

QuotationSubmittedCount: The count of quotations that were submitted

QuotationCreatedCount: The count of quotations that were created

Analysis Requirements:

Provide the names of these agencies along with their respective premium values. To list the Agencies in any category of the output, check the number and accordingly show the top 2% of agencies.

Format the response exactly as shown below, with no extra commentary or processing updates. Show only the important phrases from the task.

Summarize the data

Identify the agencies with the highest and lowest Total Premium Amounts.

Determine the agencies with the highest number of quotation submissions and creations.

Identify cases where agencies have a high number of submitted quotations but a relatively low binded count

Analyze agencies with a high number of submitted quotations but a low number of binded quotations.

Highlight potential inefficiencies or gaps in conversion rates by calculating the conversion percentage (binded count / submitted count).

Show outliers, if any and state the reason for the same

Example Output:

\*\*Agencies with the Highest Premium Amounts: \*\*

Alkeme: $33,572

Alliant Insurance Service: $32,330

\*\*Agencies with the Lowest Premium Amounts: \*\*

Rich & Cartmill Inc: $1,775

Robertson Ryan and Associates Agency: $1,810

\*\*Top Agencies ranked by Premium Amount from highest to lowest\*\*

Alkeme: $33,572

Alliant Insurance Service: $32,330

Hub International Ltd: $30,000

Lockton Cos LLC: $29080

Holmes Morphy and Associates Inc: $28425

\*\*Average of the Total Premium Amount from all agencies:””

$X

\*\*Top Agencies with the Highest Number of Quotation Submissions: \*\*

Alliant Insurance Service: 117 submissions

Hub International Ltd: 87 submissions

\*\*Top Agencies with the Highest Number of Quotation Creations: \*\*

Alliant Insurance Service: 18 created

Hub International Ltd: 14 created

\*\*Cases with High Submissions but Low Binded Counts: \*\*

Lockton Cos LLC: 60 submitted, but only 6 binded

Agency Not Mapped: 63 submitted, but only 3 binded

\*\*Outliers:\*\*