Functional Requirements Document – Auto Notification System (AU Market)

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**Summary**

This project aims to reduce customer attrition in the Australian market by implementing an Auto Notification System (ANS). The system will proactively alert customers seven days before their travel benefits are set to expire. Due to new government regulations, we are restricted from directly asking customers to retain their cards. Therefore, timely, automated reminders will help reduce cancellations while ensuring compliance.

**Backgound**

While there are multiple reasons for cancelling their cards, majority of our customers cancel because, they’re unaware of their travel credit’s expiration date. Many assume that the expiration date aligns with their card's annual fee, when in reality, the credit typically expires nearly a month earlier. This confusion leads to forfeiture of travel credit/free flight benefit on travel cards. This issue has become a leading cause of preventable churn in the AU market.

**In Scope**

* Notifications to be delivered on their registered email address and phone number about expiration of travel credit.
* Communications to be sent exactly 7 days before the expiration date.
* Email communication can include easy steps for travel credit redemption.

**Out of scope**

* GWG credits or reissuance of expired credits.
* Calling to redeem the travel credit.

**Stakeholders**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Role** | **Department** | **Responsibility** |
| Brad cooper | Project Sponsor | CEN | Budget & approvals |
| Mayank Saxena | Analyst | CFN | Requirements & documentation |
| IT Lead | Developer | Technology | Notification implementation |
| CRM Manager | Data Analyst | Marketing | Customer segmentation & scheduling |

**Functional requirements**

|  |
| --- |
| * The system must run a scheduled scan at 08:00 AEST to check for customers with travel benefits expiring in exactly seven days. |
| * Customers must meet eligibility criteria, i.e. active card, valid contact information and, unused credit. |
| * Eligible customers must receive an email and a text notification. |
| * The email must include the expiration date, redemption steps, and a link to redeem the benefit. |
| * The text must not contain more than 30 words for credit usage reminder with a shortened link to credit redemption. |
| * ISP must register, and sent out notifications should be visible to CCPs for respective accounts. |
| * If a customer redeems the benefit after receiving the reminder, no further action is needed. |
| * If no redemption occurs by the expiration date, the benefit will be marked as forfeited, and no follow-up will be triggered. |

**Input requirements**

* MMID
* Expiration date
* Email Address
* Phone Number
* Card’s Status

**Data sources**

ISP for contact details and card’s status

Star access to filter out expiration date

**Notification Format**

Email:-

Subject line- “ Hurry up! Your travel credit is about to expire soon!”

Dear CM,

Please redeem your travel credit worth XX by XX, else it will get expired. To redeem your travel credit, kindly follow this link. ( click here URL). Please don’t respond to this email. If you have any questions, please feel free to reach out to Amex customer services team via chat or call.

Thank you

Text**:-**

Hi XX,

Please redeem your travel credit by XX, else it will get expired. To redeem your travel credit, kindly follow this link. ( click here URL).

**Expectations**

* This notification system will neither affect any current applications being used for servicing customers, nor will it affect website functionality for users.
* Customers can receive not more than one notification per membership year.

**Restrictions**

* Text notification should not include our company logo, as it may be considered a picture message. Some network carriers might charge customers for receiving a picture message.
* No response can be given to customers via email or text if they try replying to email and text notification.

**Notification Flowchart diagram:-**

A screenshot of a computer screen

AI-generated content may be incorrect.