

Phase 1: Problem Understanding & Industry Analysis

Requirement Gathering

- Conducted detailed discussions with mentors and peers to identify main points in insurance operations.
- Collected requirements for managing **Customers, Policies, Claims, and Mentors/Agents**.
- Key requirements identified:
 - Efficient customer data management
 - Policy creation, renewal tracking, and coverage monitoring
 - Smooth claim submission and multi-level approval process
 - Automated notifications and reminders
 - Role-based access for Admin, Agents, and Managers

Stakeholder Analysis

- Identified primary stakeholders:
 - **Customers:** Need quick access to policy and claim status.
 - **Agents/Mentors:** Manage assigned customer portfolios efficiently.
 - **Managers:** Require dashboards and reports to monitor claims, policies, and approvals.
 - **Admin:** Manages overall system configuration, security, and approvals.
- Understanding stakeholder needs ensures the system addresses **real-world challenges** effectively.

Business Process Mapping

- Mapped existing insurance workflows:
 - i. Customer purchases policy → Policy details recorded
 - ii. Claims submitted → Reviewed by agent → Approved/rejected by manager
 - iii. Manual notifications/reminders → Often delayed
- Identified bottlenecks and inefficiencies in manual processes.
- Proposed automated workflows and approval processes to **streamline operations**.

Industry-specific Use Case Analysis

- Analyzed common insurance use cases relevant to the project:
 - Policy issuance and renewal tracking
 - Claim processing with multi-level approvals
 - Customer self-service for policy status and notifications
 - Compliance and reporting requirements
- Ensured Salesforce implementation aligns with **insurance industry standards** and best practices.

AppExchange Exploration

- Explored Salesforce AppExchange to check for existing solutions or templates.
- Evaluated pre-built apps for **policy management, claim tracking, and dashboards**.

- Decided on **custom implementation** to meet project requirements and provide flexibility.