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:

  o Efficient customer data management

  o Policy creation, renewal tracking, and coverage monitoring

  o Smooth claim submission and multi-level approval process

  o Automated notifications and reminders

  o Role-based access for Admin, Agents, and Managers

Stakeholder Analysis

- Identified primary stakeholders:

  o Customers: Need quick access to policy and claim status.

  o Agents/Mentors: Manage assigned customer portfolios efficiently.

  o Managers: Require dashboards and reports to monitor claims, policies, and approvals.

  o 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

- Analysed common insurance use cases relevant to the project:

  o 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.