

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

- Analysed 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.